



# The Gallagher Executive Benefits Team

## Executive Compensation and Benefits Consulting for Credit Unions

Over 500 credit unions choose the Gallagher Executive Benefits team to design, implement and administer their executive benefit plans. Our focus is on safety and reliability, with ongoing regulatory compliance. The Gallagher Executive Benefits team provides full-service support to manage the day-to-day needs of your high-stakes, complex plan investments.

### Why partner with the Gallagher Executive Benefits team?

- **Proven history:** Gallagher has more than 25 years of experience providing consulting services for compensation and executive benefit planning for financial institutions in highly regulated industries.
- **In-house servicing:** Gallagher manages your new or existing programs with its own staff and resources. If you or your participant has a question about a plan, you will speak with your designated service team, not a subcontractor or third-party call center.
- **National capability with local service:** Our presence allows us to see emerging trends across the country and share best practices with our clients while providing local, personal service.
- **Online account access:** Plan administrators and participants will have access to a SOC 1 certified online account portal.
- **Ongoing regulatory compliance:** Our team retains the law firm of Sherman & Patterson as legal specialists in the design and regulatory compliance of nonprofit executive benefit plans with experience and relationships with both state and federal examiners.
- **Multiple product offerings:** Gallagher has relationships with, and access to, a wide range of investment alternatives and insurance carriers.
- **Data-driven methodology:** Gallagher supports the credit union movement by producing two major industry-comprehensive compensation and executive benefit surveys that help our clients benchmark their own programs.

More than just a service provider,  
Gallagher offers a long-term  
partnership based on demonstrated  
knowledge and accountability.



## Meet the Gallagher Executive Benefits team

Our consultants work closely with credit unions to create strategies that attract and reward top executive talent. Drawing on more than 25 years of experience, we deliver tailored executive benefit plans with innovative funding and expense-mitigating solutions.

Collaborate with our consultants to strengthen your executive retention strategy with customized plans designed to help your credit union reach its goals.



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