



Wealth-Health Executive Network

WHEN Credit Union Peer Group

[The Wealth-Health Executive Network](#) (WHEN), now in its 6th year, is forming a dedicated **Credit Union Peer Group**. WHEN Peer Group Advisor **Guy Messick** notes, “The health of a CU member often has a direct impact on the ability to meet his/her financial obligations. Providing health care information and resources to members (1) is a value-add of credit union membership, (2) helps members manage health related issues to enable them to meet their financial obligations, and (3) provides credit unions with income opportunities.” WHEN provides its members with information and perspectives to understand and address wealth-health issues. It brings together executives from different fields to “connect dots” across the financial, medical, care, and wellness industries.

WHEN member **Steve Franke of Allegacy FCU** (an industry leader in integrating wealth and health within the investment program and across the credit union) has agreed to lead this group. The **objective** is to provide a collaborative forum to help credit unions better understand how wealth-health integration at any level can support all areas of their business. Peer Group Members will share their unique questions, experiences, and the opportunities they see to integrate wealth and health. *We also encourage members to invite executives from different business units within their organization to foster internal collaboration and support their credit union and members in a more holistic way.*

Credit unions are ideally suited to effectively address wealth-health integration given their true member benefit orientation and [organizational nimbleness](#). What CUs may sacrifice in [economies of scale](#), they offset with cooperative collaboration, affinity with members, and deep local knowledge.

As a special offer, WHEN will provide **full member benefits** to credit unions for \$3,500 per year (over 50% off the regular dues). In addition to facilitated CU peer group meetings, WHEN member benefits include:

- Regular meeting with targeted discussions on key topics (currently quarterly meeting [“clusters” via Zoom](#))
- Opportunities to **network** with leaders across financial services as well as medical, care, and wellness industries.
- WHEN [Members website](#) designed to foster member exchange and provide access for your organization to the growing library of WHEN thought leadership material, session recordings, speaker materials, research, white papers and surveys.
- Ad hoc **advice and research** from DSG Principals for questions on issues you face and to provide a sounding board as you develop and implement strategies.

For more information, please contact:

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