

MINNESOTA CREDIT UNION EMPLOYEE BENEFITS PLAN

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2023 CANDIDACY DECLARATION

NAME: Jon Morrill CREDIT UNION: Mid Minnesota FCU

BIOGRAPHICAL INFORMATION

REASON FOR RUNNING

I believe my experience with fully-insured and self-insured benefit plans and various benefit providers would be helpful as a member of the Minn. CU EBP Board of Trustees. My limited time on the Board to date has provided me with an elevated interest in continuing to build upon past benefit plan successes and greater opportunities for future benefit plan growth.

As discussed at our last 2022 Board meeting, change can be difficult for some credit unions. There is a comfort level created by following things that have historically worked. I think our challenge is to help CU's see beyond the immediate future and consider benefit plans that could help protect their employees and members several years in the future. Continuous supportive communication, financial and risk benefits of the change, and trust in the messengers are key to success.

BACKGROUND/EXPERIENCE

My relevant work experience has been in the human resources realm for more than 20 years, much of which has been focused on employee benefit plans or supporting the internal organizational structures charged with developing, communicating and facilitating benefit plans. I've worked with both fully-insured and self-insured programs.

Most recently I was responsible for a self-insured benefit plan for more than 800 employees. We had an annual budget of greater than \$8 million. With this plan, we also utilized a third part administrator (TPA) to process claims and a stop-loss partner to reduce plan risk. The Health Care Trust Board, which I headed, met monthly to review claims data and requests for claim denial appeals.

Prior to this I worked for a large international firm and assisted with benefit communication, training, delivery, problem resolution, and employee support. This plan was also a self-insured structure. In addition to my usual HR responsibilities, I was responsible to ensure the employees (approximately 8000) in my geographic areas were able to understand and utilize the benefit programs offered.

I certify that I meet the qualification standards required to be a candidate for trustee of the Minnesota Credit Union Employee Benefits Plan.


Signature

01/24/2023

Date

Candidacy Declarations must be emailed, mailed, faxed or hand delivered to:

Minnesota Credit Union Network, Attn: Tommy Rempfer, 555 Wabasha Street N. Suite 200, St. Paul, MN 55102, tremper@mncun.org, Fax: (651) 288-5171 by no later than **4:30 p.m. CST February 24, 2023.**