

FOR IMMEDIATE RELEASE

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Mid Oregon Wealth Management Representative Named Rookie of the Year

Marc Cabanilla recognized for significant investment growth, work ethic, and service to members.

TruStage™ Financial Group awarded Marc Cabanilla of Mid Oregon Wealth Management Retirement and Investment Planning as 2023 Rookie of the Year.

Cabanilla was recognized for his outstanding start in his first year at Mid Oregon Wealth Management, citing several key accomplishments, including:

- \$657,850 in 2023 GDC Production, finishing fourth overall on the Northwest Team
- \$28M in new deposits, finishing second overall on the Northwest Team
- \$10M in new fee-based assets under management
- Assisting clients with a broad product mix

In addition to achieving significant growth for the Mid Oregon Wealth Management program, Marc was also recognized for his other professional and leadership accomplishments, receiving the 2023 Bright Futures award, being named #15 in the Honors Academy, as well as other recognition for his contributions on team calls and as a trusted resource for other representatives.

Although Cabanilla was chosen as “Rookie of the Year” for his first year’s accomplishments at Mid Oregon Wealth Management, he is not new to the retirement and investment planning industry, having started his career in Utah at a local investment firm and later at a credit union. He brought that experience, as well as a dedication to serving his community, to his role on Mid Oregon Wealth Management’s team in late 2022.

“Marc has been such a great addition to the Mid Oregon team. His work ethic, professionalism, and service quality have made fans of many members,” said Kevin Cole, Mid Oregon President/CEO. “We are so very

proud of Marc's recognition as Rookie of the Year and look forward to continued growth and success of the Mid Oregon Wealth Management program."

Christopher Allen, TruStage's Pacific Northwest Region Advisor Manager, added: "Marc has turned Mid Oregon Wealth Management into an impactful partnership which is now profitable for all parties. Marc leveraged his knowledge from his previous roles and turned our isolated program in Bend, Oregon into a high growth and thriving business. In addition, he and his family have become part of the fabric of their new community, assisting in numerous community, religious, and volunteer activities."

Photos:

- Caption: (Left to right) TruStage's Christopher Allen, Registered Representative Marc Cabanilla from Mid Oregon Wealth Management, and Mid Oregon Credit Union CEO Kevin Cole. Cabanilla was named a TruStage Rookie of the Year in acknowledgement of his work ethic, professionalism, and contributions to the growth of the Mid Oregon Wealth Management program.

Mid Oregon Credit Union is a full-service, member-owned financial cooperative headquartered in and serving Central Oregonians since 1957. With more than 47,000 members in Deschutes, Jefferson, Crook, Wheeler, Lake, and North Klamath Counties and more than \$706 million in assets, Mid Oregon partners with members to meet their financial needs and to help them achieve their dreams. Mid Oregon was named a Top Workplace in Oregon and Southwest Washington for 2022 and 2023. It was also ranked the #1 credit union in Oregon by Forbes and the Best of Bend Community Choice Award in the credit union category. For more information about its services and branch locations in Bend, La Pine, Madras, Prineville, Redmond, and Sisters, please visit [midoregon.com](https://www.midoregon.com).



TruStage™ is a financially strong insurance, investment, and technology provider, built on the philosophy of people helping people. TruStage believes a brighter financial future should be accessible to everyone, and our products and solutions help people confidently make financial decisions that work for them at every stage of life. With a culture rooted and focused on creating a more equitable society and financial system, TruStage is deeply committed to giving back to their communities to improve the lives of those they serve.

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