



Maryland State Council Mid Term Meeting 2022



Knights of Columbus Insurance
Positioning our members for financial security
and success



Cutting edge analytic tools



- Profiles Professional software for a full financial analysis
- Survivorship, Retirement, Education, Long Term Care and Disability Income planning
- Tax brackets, inflation and social security are all a part of this integrated approach
- A holistic versus product driven approach



Benefits of a more holistic approach



- The planning process is based on data and facts as well as our member's warm and fuzzy goals
- Each plan is customized and specific to their situation
- All financial needs that are uncovered are due to the members input – in essence, the information they give us will determine the results



Catholic Mutual Funds



- Knights of Columbus Asset Advisor
- Initially rolled out to Catholic Institutions over 7 years ago
- Available to all Catholics, not just members...in fact, anyone can buy these funds
- Attracting Catholics another way to us – with the opportunity for recruitment into the Knights of Columbus
- All funds comport to the US Conference of Catholic Bishop's Socially Responsible Investment Guidelines



Fraternal Benefit Nights



- 2 per year to qualify for a council's insurance goal for the Fraternal year
- The council's job is to promote the event...the agent's job is to make the format and agenda attractive enough that members and fellow Catholics will want to attend
- Inside of 2022 we will hold a Special Needs Seminar for our families with children and grandchildren who have special needs
- We see this as a way to help families and attract new members to our Order



Recruiting New Members



- Each Field Agent has been charged with recruiting 12 new members per calendar year
- In 2021...agents recruited over 10,000 members
- When we recruit someone as an E-member we encourage them to join a local council – the councils are the backbone of the KofC!



Knights of Columbus Agent Position



- We are typically fully staffed, most of our agents have been with us for 10+ years
- There is an opening now and we anticipate another opening inside of 2022
- We are looking for the right man who wants to align his faith with his career



Thank you!



- For your dedication to our Order
- For your willingness to take a leadership position – there is always a price for leadership as well as a reward
- For your support of our Insurance program and your council Field Agent!