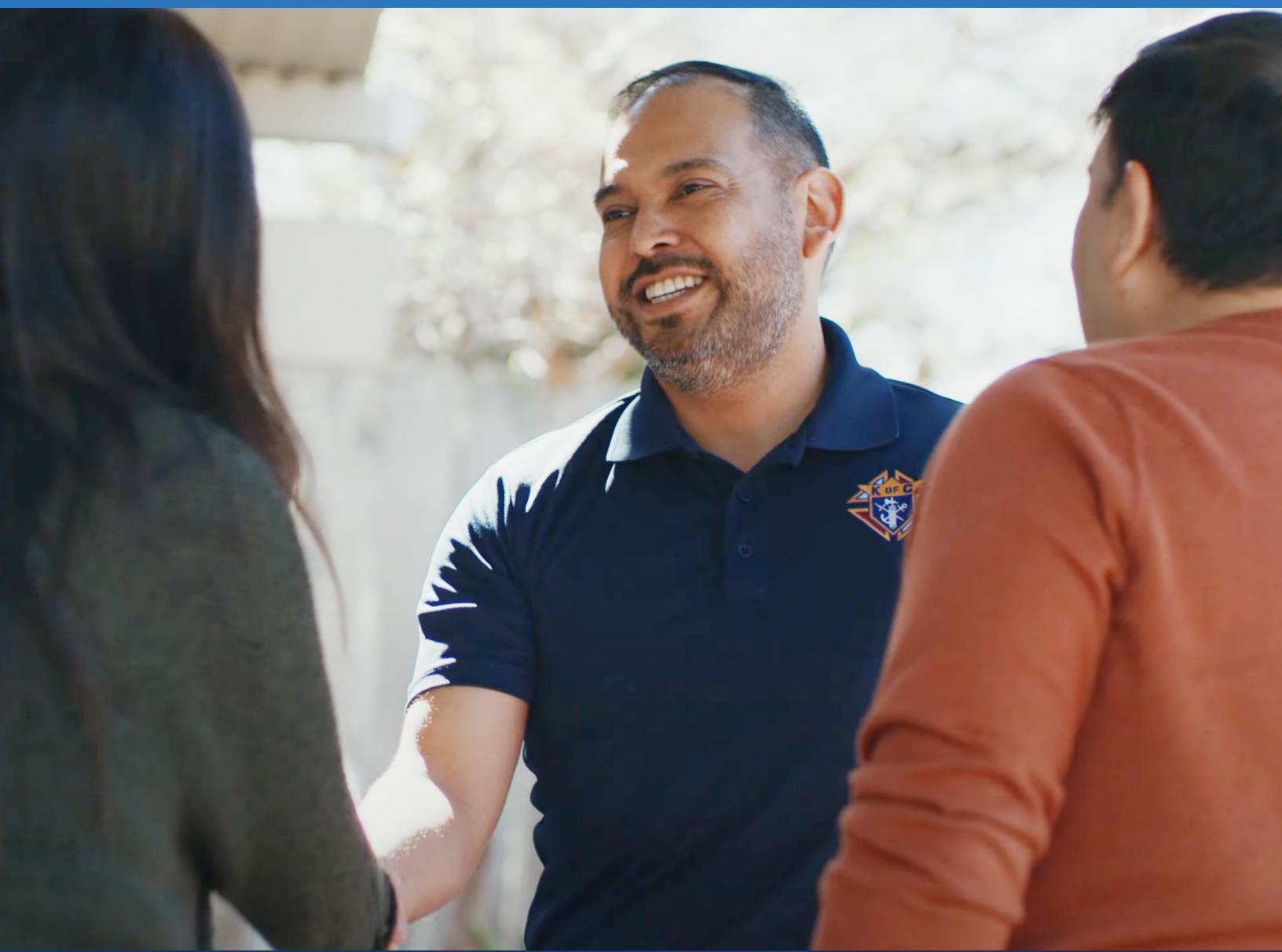


FAITH & FINANCE

Fraternal Benefit Events Guidebook



A resource guide for successfully planning
and coordinating Fraternal Benefit Events
for your council and community.

INTERNAL USE / 2023



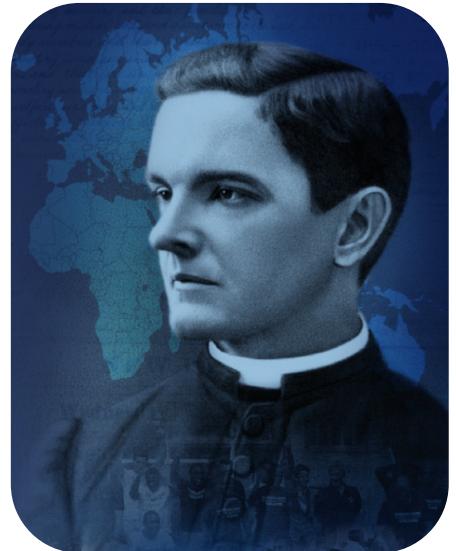
**Knights of
Columbus®**



Introduction

For more than 140 years, our Order has honored and maintained the legacy of Blessed Michael McGivney by protecting our families, proclaiming the faith, and helping those in need. **One of the core ways in which we have carried out this mission is by assisting families in planning their financial future and achieving economic security.**

Today, an ever-increasing number of Catholic families have made the decision to align more closely their financial choices with their faith. They understand that money is a blessing that can serve the double purpose of helping to protect their financial security and family's future, as well as having a positive charitable impact on those in need while respecting the principles of our shared faith and the pursuit of the common good.



As Knights, supported by our field agents, we are well suited to step into the breach to meet this growing need.

A Fraternal Benefit Event is not only a great way to remind members of the fraternal benefits available to them, it's also a great way to introduce prospective members to the Knights of Columbus.

This guide includes information and resources to help your council leadership partner with your local agent to organize and promote a successful **Fraternal Benefit Event** that introduces our financial services and solutions to both members and non-members.

Our biggest opportunity over the next few years:

To introduce our retirement planning and insurance solutions to members and, for the investment services that apply in your jurisdiction, to non-members*.

* While our insurance portfolio is exclusive to members and their families, the investment and charitable giving solutions and products offered by Knights of Columbus Asset Advisors are available to non-members through licensed Investment Advisor Representatives.

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Why hold a Fraternal Benefit Event?

Meets an unmet need among Catholic families

Concrete way to demonstrate the unique value of our Order

Opportunity to recruit new members and engage existing members

Platform for sharing information on the suite of financial services offered by KofC and, when applicable, our partners Knights of Columbus Asset Advisors and Knights of Columbus Charitable Fund

Part of the legacy handed down to us by our founder, Blessed Michael McGivney

Help your council achieve the Founder's Award, a component of the Star Council Award



**What does a successful
Fraternal Benefit Event look like?**

- ✓ Short events hosted in partnership with your local agent featuring a brief presentation, question and answer period, time for socializing and, at times, light food and refreshments
- ✓ Open to men and women, members and non-members
- ✓ Promoted at least 3 to 4 weeks in advance across multiple channels (e.g.: parish announcements, posters, several rounds of personalized emails, etc.)
- ✓ Features an invitation to membership for those eligible men who are not yet members of your council
- ✓ Followed up with a personal email and phone call with participants who demonstrated interest in joining your council



Phases of a Fraternal Benefit Event

A simple and effective, dialogue-driven process

Phase 1 / Planning



Phase 2 / Promotion



Begin planning your Fraternal Benefit Event a full 8 to 10 weeks before your event date. Employ a collaborative approach (with your agent and a small group of engaged volunteers) and, together, be sure to consult and use the planning workbook available on the Online Supply Store.

Key tasks:

- Grand Knight contacts local agent to discuss support of the idea, determine feasibility and options on timing
- Grand Knight appoints event coordinator to act as official liaison with local agent
- Book a first planning meeting
- Confirm event details and book location
- Clarify roles, responsibilities and timelines
- Date/time options are shared with your local pastor/council chaplain and any other key guests to ensure attendance

Using the planning workbook as a guide, build out your promotional materials, which can be found through the Online Supply Store. Generate maximum interest in your event by allowing for at least 3 to 4 weeks of active promotion, using multiple promotional channels and embracing the power of repetition and reminders.

Key tasks:

- Confirm your promotional efforts
- Prepare your promotional materials
- Track RSVPs and share
- Send a reminder email to all who have RSVP'd

Remember, any public promotion at your parish should be done with your pastor's permission and consent.

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Phases of a Fraternal Benefit Event continued ...

Phase 3 / Logistics



Phase 4 / Follow up and reporting



Good audio/visuals, a brief but diverse program that flows efficiently, and time for socializing are critical to the success of your event. Before event date, be sure to review your program flow, and to discuss any concerns with your agent or committee. On day of the event, give yourself enough time for setup and any final preparations.

Key tasks:

- Event coordinator arrives early to site to make sure everything is set up
- Your agent will provide a sign in sheet to track attendance. He will share with you after the event
- Mobilize hospitality team
- Agent delivers/leads presentation
- Open up the floor for questions and answers
- Be sure to invite prospects to consider joining your council
- Thank all attendees, council leadership, priest/council chaplain, other volunteers and the agent

A good follow up is, in many cases, critical to reaching new members and engaging existing members. Work with your local agent to capture contact information of all participants and discuss how to follow up – at least once via email and another time via phone.

Key tasks:

- Hold a debrief / post-mortem of your event
- Council leadership follows up with attendees in your council area – those interested in joining your council
- Fraternal leadership completes form no. 11077 – Fraternal Benefit Event Form

Fraternal Benefit Events Guidebook



Resources

To help you promote Fraternal Benefit Events, we have developed an assortment of marketing resources and a planning workbook that are available through our Online Supply Store. Remember to work closely with your local agent to coordinate all promotional efforts and materials.

Event Planning Workbook.

To serve as a guide and workable checklist.

Event posters.

Print and digital – with customized space for your local information.

Bulletin and pulpit announcements.

Short announcements for you to personalize.

Social media.

Smaller versions of the posters.

Emails.*

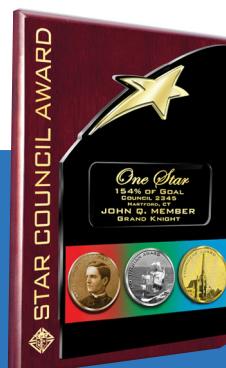
For members and non-members.

***Guidance for Opt Outs:** For legal reasons, in each email to members regarding Fraternal Benefit Events (FBEs), it is important that you include a process whereby the member may opt out from receiving future messages on FBEs. This would apply to any commercial email messages you send to members. Please honor these requests by keeping a separate email list for FBE advertisements and other commercial email messages that does not include your members who have requested an opt-out.

The main contact person and presenter of Fraternal Benefit Events must be, at all times, your local agent. Your local agent will use presentations pre-approved by Ad Review and made available by home office.



Visit the **ONLINE SUPPLY STORE** for the complete assortment of up-to-date resources.



REMINDER

Our Founder's Award program, which recognizes excellence in the promotion of our insurance and fraternal benefits, requires that a council host (or co-host) at least two fraternal benefit events per year. Each event must have a minimum of 7 members or member-eligible attendees to qualify.



Conclusion

**The need is high. Agents are ready.
Let your council and community know
what we have to offer.**

Thank you for practicing your faith, living your mission, leading your family, and helping to continue the legacy of our founder, Blessed Michael McGivney.

Contact your local agent today to book your next Fraternal Benefit Event.

If you're not sure who your local agent is, visit our Find an Agent page (kofc.org/faa) and enter your council's zip code (or postal code).

If your council does not currently have an assigned field agent, please contact your general agent to coordinate a Fraternal Benefit Event.



Catholic families that entrust the Knights and our partners with their insurance, retirement planning and charitable giving choices can enjoy the peace and satisfaction that comes from knowing they are protecting their financial future and pursuing their family's financial security with an organization that shares their Catholic values.



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