

US February 2025 Agent Message for Councils (Script for live event)

Brothers,

It feels like the new year just began, and yet we're already here in February!

Maybe you've set resolutions and goals for the year. Are financial goals on that list?

Every year, at a minimum, I recommend reviewing your finances. There are four things to include in your review.

First, have you experienced any major life events in the last year? Things like getting married, welcoming a baby, changing careers or purchasing a home are good reasons to consider life insurance.

If you already have insurance, make sure your policy matches your current financial goals and responsibilities. Consider, too, that if your policy is dependent on your current employer, you could be underinsured.

Second, review your retirement goals. Do you know how much money you'll need to retire comfortably? And if so, are you on track?

Third, the new year is a good time to review your will or trust. Have you experienced a recent life event that would make you want or need to make adjustments? Now is the time to check.

Finally, consider if you're missing an opportunity to grow your assets. With faith-based investment options through our affiliate, Knights of Columbus Asset Advisors ("KoCAA"), you can pursue your financial goals with products that adhere to Catholic investment guidelines. Our Agency can connect you with one of our team members that is registered to offer you investment options through KoCAA.

It's not too late to make a resolution to review your finances!

I'd love to sit down with you, discuss your goals and conduct a complimentary needs analysis. If you have any questions, please come chat with me and we can schedule a time to meet.

Thank you!

Post Script: You can visit KofC.org and KoCAA.org for detailed information on what each of KofC and KoCAA can offer members directly