

You're Invited



2021 Year-End Review and 2022 Economic Outlook

Join us for an online panel presentation for a year-end review of 2021 and an Economic Outlook for 2022, a discussion about the services and opportunities with the Knights of Columbus Asset Advisors and opportunities with Donor-Advised Funds and Qualified Distribution Contributions with the Knights of Columbus Charitable Fund. Brief presentations followed by time for Q&A.



Anthony V. Minopoli

President & Chief Investment Officer, Knights of Columbus Asset Advisors.



Dennis Gerber, Jr.

President & CEO Director of Philanthropic Strategies, Knights of Columbus Charitable Fund.



Thomas Duffy

Vice President, Investment Strategy, Knights of Columbus Asset Advisors.

KoCAA is an SEC registered investment adviser that maintains a principal place of business in the State of Connecticut. For information about KoCAA's business operations, please consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. Knights of Columbus Asset Advisors, LLC, is a wholly-owned subsidiary of Knights of Columbus, the world's largest Catholic Lay Organization.

Knights of Columbus Charitable Fund, Inc. is an independent, nonprofit, public charity with a donor-advised fund program. Various entities affiliated with Knights of Columbus provide certain investment management and administrative services to Knights of Columbus Charitable Fund. Knights of Columbus Asset Advisors, LLC serves as the investment manager of Knights of Columbus Charitable Fund, and the assets are invested in investment funds managed by Knights of Columbus Asset Advisors. Investing involves risk. The value of an invested donation will fluctuate over time and may gain or lose money.

This is not an offer to sell or solicitation of an offer to buy any security. The risks associated with each Knights of Columbus mutual fund are explained more fully in each fund's respective prospectus. Investors should consult with their attorney, accountant, and/or tax professional for advice concerning their particular situation. Mutual Funds are not insured by the FDIC or any other federal government agency, may lose value, and are not a deposit of or guaranteed by any bank or any bank affiliate.

***Virtual event, a qualified financial meeting for Councils, free to attend**

Sponsored by Ruffo Agency: John Ruffo, General Agent, IAR; and Ed Patterson, FA & IAR

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When

2022 Economic Outlook

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**Knights of
Columbus
Asset Advisors®**



**Knights of
Columbus
Charitable Fund™**

Knights of Columbus Asset Advisors (KofCAA)

“2021 Year-End and 2022 Economic Outlook”

by Tony Minopoli, CEO and President, of Knights of Columbus Asset Advisors.

(This is the first virtual Fraternal Benefits Night (FBN) educational financial series, for Connecticut and Rhode Island Knights and family, which will be held on **Tuesday, January 18th @ 7pm.**)

[REGISTER](#)

The “**2021 Year-End and 2022 Economic Outlook**” presentation will provide Knights an introduction of the new KofCAA member benefits and the partnering division the Knights of Columbus Foundation (KofCF). The evening presentation will kick-off with the Ruffo Agency, commandeering the Investment Advisory Representative (IAR) service to CT & RI members; Thomas Duffy, VP of Investments KofCAA, discussing KofCAA outline of services and opportunities; Dennis Gerber, CEO and President of Knights of Columbus Foundation, discussing the cooperative tie with charity opportunities with Donor Advised Funds and Qualified Distribution Contributions. Finally, Tony Minopoli, CEO of KofCAA, will discuss the new KofCAA financial vision and the “Economic Outlook.”

This Economic Outlook is based on gaining a better financial knowledge and access to KofCAA and KofCF with the help of the Ruffo Agency (IAR) servicing in CT and RI. This a two-part series being held in the first quarter (Q1) and third quarter (Q3) of the year to keep the members updated and informed regarding their financial management options. We’ll be coordinating with the help of District Deputies, Grand Knights and membership outreach to notify members to attend. Also, this meeting will count as a qualified Council financial education opportunity.

2021 Year-End and 2022 Economic Outlook Agenda:

7pm – Introductions & Agenda by the Ruffo Agency: John Ruffo, General Agent & IAR; and, Ed Patterson, FA & IAR.

7:05 – Thomas P. Duffy, Vice President of Investment Strategy, to discuss the KofCAA investment outline and opportunities. The IAR role and the fiduciary investment process to help service Knights.

7:25 – Dennis Gerber, President and CEO of KofCF, to discuss the partnering with the KofCAA and the charity/gifting outline and opportunities.

7:45 – Tony Minopoli, CEO & President of KofCAA, to discuss the new financial vision, USSCB guidelines of investing and the financial outlook report.

8:05 – Q&A

8:20 – End presentation

To [REGISTER](#) and additional information, contact the Ruffo Agency:

John Ruffo, General Agent & IAR – 860-866-8712 (office) / john.ruffo@kofc.org

Ed Patterson, FA & IAR – 860-215-349 (cell/text) / ed.patterson@kofc.org

Benefits:

- A qualified financial Fraternal Benefit Night (FBN) meeting for Councils.
- NO COST to attend and open to the public (member and non-members).
- Virtual – to provide access to all (internet) members regarding the health against COVID.
- Encourage Council gatherings to engage and view the presentation for members.
- Promoted with District Deputies and Grand Knights.