

June 2025 Council Message - US

Many people this time of year are wrapping up spring cleaning around their home. But if you're like me, you might need a little nudge each year — a reminder to get started on that process.

Similarly, we could all use a reminder to do some “spring cleaning” for our finances.

Just as spring cleaning in your home might help you realize that a piece of furniture no longer suits your needs, we might also find that it's time to reconsider our financial strategy in light of our current life situation.

For example, have you recently gotten married, welcomed children, or made a career change? Do you have children heading off to college, or are you welcoming any grandchildren? It may be time to think about life insurance.

If you do have life insurance, when's the last time you reviewed your policy? Do you have coverage only through your employer? Now is a great time to ensure it matches your family's current needs.

Have you started preparing for retirement? Whether close to your golden years or still decades away, you can learn more about annuity options that give you a guaranteed income.

Additionally, through our affiliate Knights of Columbus Asset Advisors (KoCAA), you can maximize your contributions to your retirement and investment accounts. If you're close to retirement, you want to ensure that you diversify your retirement portfolio and have proper asset allocation that aligns with both your risk and return preferences. KoCAA can help you review your investment strategy to ensure you're on the right track to hitting your retirement goals.

You might find that things have changed in your life since your last “spring cleaning.” Even if it's been a while since you last reviewed your financial goals — or even if you're just getting started — I'm here to help. Let's set up a time to talk and make sure you have the coverage you need.

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

Guarantees assume all premiums are timely paid and are based on the claims-paying ability of the issuer. Any policy loans will impact the guarantees by reducing the policy's death benefit and cash values.

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