News Release

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Knights of Columbus Asset Advisors Celebrates Ten Years of Offering a Catholic Difference for Investors

KoCAA's "value with values" approach allows clients to invest with integrity in alignment with the USCCB and Catholic teaching

New Haven, Connecticut — Knights of Columbus Asset Advisors (KoCAA) today celebrated ten years of offering individual and institutional investors a "Catholic Difference" approach to investing that aligns with their beliefs, guidelines established by the United States Conference of Catholic Bishops (USCCB), and Catholic teaching. In 2015, KoCAA, a wholly owned subsidiary of Knights of Columbus, launched a suite of faith-based investment solutions — a natural extension of the Knights' overarching financial services program — to meet the growing need for faith-based investment strategies for Catholic institutions such as dioceses, church organizations, endowments, foundations, universities and hospitals. In 2021, KoCAA launched the individual advisor representative program and today, there are nearly 200 financial advisors helping to bring Catholic investment solutions to individual investors.

"Since the Knights of Columbus was founded more than 140 years ago by Blessed Michael McGivney, our mission has included the protection of Catholic families and their financial security," said Knights of Columbus Supreme Knight Patrick Kelly. "Knights of Columbus Asset Advisors is dedicated to investing according to Catholic principles and plays a vital role in supporting the Knights' charitable work."

As a pioneer in Catholic investing with over $28 billion in assets under management, KoCAA offers one of the largest suites of Catholic investment solutions with nine mutual funds and over 80 model portfolios to help clients meet their financial needs and goals.

"Knights of Columbus Asset Advisors seeks to deliver consistent, positive, excess returns with lower risk. As a Catholic investment firm committed to Catholic values, we can offer more compelling solutions for Catholic entities and investors," said Anthony Minopoli, Chief Investment Officer and President, KoCAA. "KoCAA participates in Catholic compliant investing with adherence to the investment guidelines set forth by the USCCB, and we have a moral theologian on retainer to provide additional input and guidance."

For more information about Knights of Columbus Asset Advisors, and to view the 2024 KoCAA Impact Report, please visit kofcassetadvisors.org.

About Knights of Columbus Asset Advisors

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 adviserinfo.sec.gov. KoCAA is a wholly owned subsidiary of Knights of Columbus, one of the world's largest Catholic Lay Organizations. Investing involves risk and you may gain or lose money on your investments. KoCAA's status as a Registered Investment Adviser does not imply a certain level of skill or training. For additional information visit KoCAA.org or write to kofcfunds@kofcassetadvisors.org. This information is intended for current or prospective investors in the U.S. only.

About the Knights of Columbus

In 1882, Blessed Michael McGivney, a young parish priest in New Haven, Connecticut, founded the Knights of Columbus to serve the needs of a largely immigrant Catholic community. What began as a small fraternal benefit society has since grown into the world's premier lay Catholic men's organization, with more than 2.1 million members in over 16,800 local councils. As members of one of the world's leading international charitable organizations, Knights around the world donated more than 47 million service hours and over $190 million for worthy causes in their communities in 2023. The Knights of Columbus also offers a range of life insurance products to members and their families. Knights of Columbus Insurance currently has more than $123 billion* of life insurance in force. In addition, the organization offers investment services in accord with Catholic social teaching through its wholly owned subsidiary, Knights of Columbus Asset Advisors, which holds more than $28 billion** in assets under management. Based on the founding principles of charity, unity and fraternity, the Knights of Columbus is committed to strengthening Catholic families and parishes, and to practicing faith in action through service to all in need. To learn more or to join the Knights of Columbus, please visit kofc.org/join.

*As of December 31, 2024
**As of February 28, 2025

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