

Financial Expertise

AT WORK TO CONNECT AND
PROTECT PEOPLE OF FAITH



Catholic United Financial, a Trusted Fraternal Life brand, is a member-owned not-for-profit, connecting people of faith, protecting their future and generously impacting parishes, schools and communities.

Catholic United Member Advisors help people from all walks of life find the solutions that will help secure their financial futures.

Give your local Advisor a call today and she or he will work to ensure a bright financial future for you and for your family.

Find the Member Advisor
in your area by calling

1-800-568-6670

or visit

catholicunitedfinancial.org/rep-finder

Free Review of Your Individual Situation

- Professional analysis of your insurance and retirement plans
- Identify areas of potential tax concerns
- Prepare for future financial needs and emergencies
- One page asset overview for your records

Estate Planning

- Estate planning summary and organization
- Preparation for an attorney appointment
- Farm and business preservation
- Charitable giving strategies through our **Foundation**

Financial Tools

- **Life Insurance**
- Fixed-rate and fixed indexed **Annuities**
- Traditional and ROTH Individual Retirement Annuities (**IRAs**)

Answers for Seniors

- Maximize and protect retirement income and assets
- Final expenses and funeral plans
- Long-term care funding solutions

Solutions for Young Families

- Term Life Insurance for children and adults
- Permanent Life Insurance that builds value
- Individual Retirement Annuities (IRAs)



Connecting People of Faith

TRANSFORMING PROFITS INTO PURPOSE

Our giving network is made up of 70,000-plus members, local volunteers, and Catholic United Financial employees who have helped raise millions of dollars for the Catholic communities of the Upper Midwest. There are multiple ways to partner with Catholic United Financial in programs that support religious education, Catholic parishes, and communities in your area. Find out more on our website at catholicunitedfinancial.org/giving.

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\$56 Million in Gifts Under Management

Non-profit Foundation stewards \$42 million for donors & \$16 million in future gifts through charitable life insurance.



\$16 Million for Catholic Schools

Raised through our Catholic United Financial Raffle program, involving more than 140 Catholic schools.



\$15 Million in Missional Programs

A collective total of dollars & volunteer hours devoted to volunteerism, scholarships, charitable giving & more.

Grants & Scholarships



Workshops & Webinars



Fundraising



Volunteer Service

