Knights of Columbus Asset Advisors Launches Investment Advisor Representative Program, Enabling Investors to Align Finances with Their Faith

New program launches with over 100 investment advisor representatives across 33 states overseeing approximately $28 million in assets.

New Haven, CT, September 14, 2021 — Knights of Columbus Asset Advisors (KoCAA) today announced the launch of its new, organically developed investment advisor representative (IAR) program, which allows clients to align their finances with their faith. Launched in 2014, after over a century of service to its parent organization Knights of Columbus (K of C), KoCAA currently manages over $29 billion for institutional investors and high net worth investors. The new IAR program offers individual investors access to this faith-based investment approach.

Clients of the new program will have access to KoCAA’s exclusive fund lineup, which is the most diversified and largest total number of funds available within the Catholic values space — totaling nine mutual funds and over 85 model portfolios. KoCAA is committed to working with clients that have over $10,000 to invest, including K of C members and nonmembers, as well as Catholics and non-Catholics. In addition to its breadth of investment choices, the IAR program offers competitive advisory fees.

“We believe that investors do not need to sacrifice their values for performance,” said Tony Minopoli, KoCAA’s president and chief investment officer. “With the launch of the program, we are extending the opportunity set to individual investors who can access both a full-service wealth management platform and the ability to invest in accordance with their faith so they can be secure in the knowledge that their investments firmly support what they believe in.”

As of Sept. 15, 2021, KoCAA has over 100 advisors across 33 states overseeing approximately $28 million in assets. Each Advisor is registered to provide investment advice and has completed a rigorous, multi-step training process and many have been serving members’ needs with other financial services for years. The firm’s goal is to employ 200 financial advisors by the end of 2021.

KoCAA is a wholly owned subsidiary of the K of C, the world’s largest Catholic fraternal service organization. With a focus on serving the nation’s 70 million Catholics and the faith-based investment market, KoCAA aligns its products and services with the guidelines set by the U.S. Conference of Catholic Bishops while adhering to a values-based
approach to investing. The guidelines include respect for life, respect for human dignity, and the Catholic doctrine on war and peace.

As a wholly owned subsidiary, KoCAA’s profits help to support K of C, an organization that provided $185.7 million in direct donations and 75.7 million volunteer hours to help build stronger communities in the last year alone.

**About Knights of Columbus Asset Advisors**

Knights of Columbus Asset Advisors is an SEC registered investment adviser that maintains a principal place of business in the State of Connecticut. For further 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. KoCAA is a wholly owned subsidiary of Knights of Columbus, the world’s largest Catholic fraternal service organization, with over $29 billion in assets under management. Please visit: [KofCAssetAdvisors.org](http://KofCAssetAdvisors.org) for additional information.

You should consider the investment objectives, risks and charges and expenses carefully before investing. Nothing presented herein is intended to constitute investment advice and no investment decision should be made based on any information provided herein. Nothing presented herein should be construed as a recommendation to purchase or sell a particular type of security or follow any investment technique or strategy. No guarantee of investment performance is being provided and no inference to the contrary should be made.