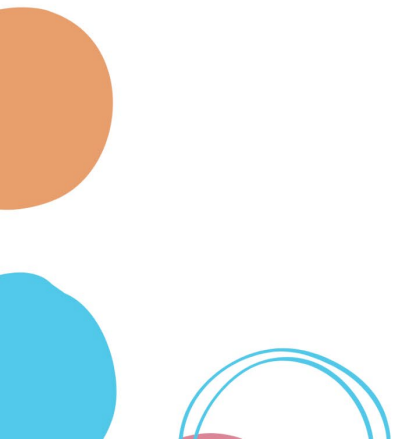
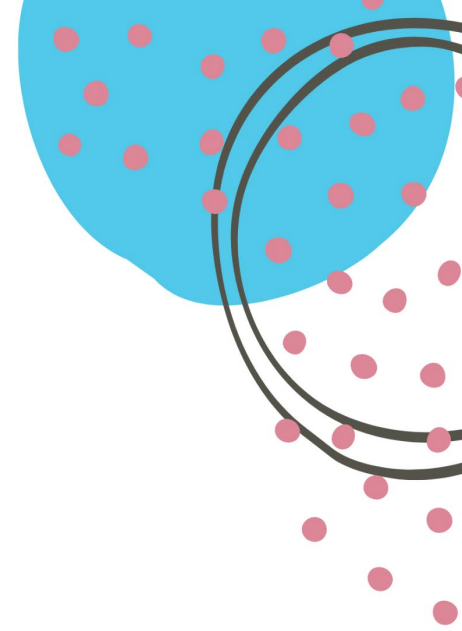


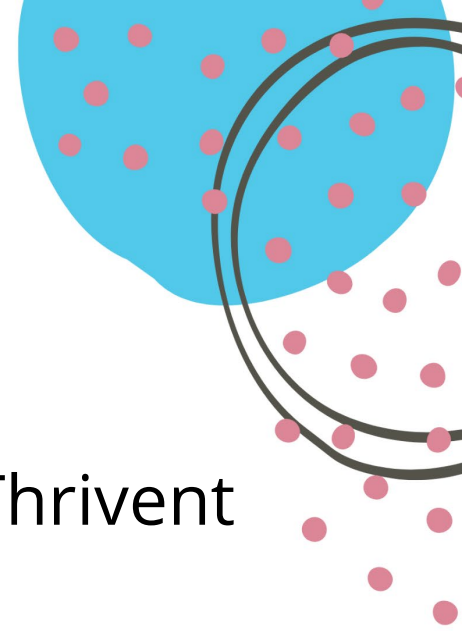
# Fraternal What?

Communicating the fraternal model



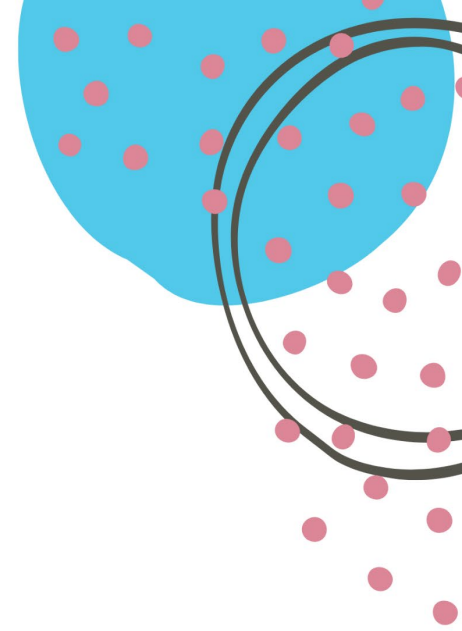
# Our Experts:

- **Maria Gaulin**  
Advocacy and Policy Research Lead, Government Affairs Thrivent
- **Tim Saccoccia**  
Vice President of Public Policy  
Knights of Columbus
- **Sharon Snawerdt**  
Corporate Communications Manager  
Modern Woodmen of America



# What's in a Name?

- **Modern Woodmen, Knights, Thrivent**
  - **Historic names, modern services**
- **Fraternal translations**
- **Internal vs external communications**



# Shared Assets: Outreach Video

What is a Fraternal Benefit Society?



# Who We Are: Thrivent

**thrivent**<sup>®</sup>

## Thrivent Across the Nation

At Thrivent, we believe that humanity thrives when people make the most of all they've been given. For over 100 years, we've helped people achieve financial clarity, enabling lives full of meaning and gratitude.

As a purpose-driven financial services organization, Thrivent creates opportunities for our membership to express generosity—from providing seed money to lead volunteer activities that meet community needs, to building capacity for local and national nonprofit organizations. A few highlights of our membership answering their call to action are included below.



**Serving more than 2 million clients nationwide**



**Life and health insurance benefits paid: \$1.76 billion**



**Average of 432 volunteer activities daily**

# Who We Are: Modern Woodmen

## What is Modern Woodmen of America?

- ▼ A fraternal benefit society founded in 1883.
- ▼ Defined by a unique blend of financial services, member benefits and community impact opportunities.
- ▼ Supportive of members, families and communities throughout the United States.
- ▼ Proud to have provided \$721,204 in fraternal benefits to members nationwide in 2021.

**The 501(c)(8) tax exemption for fraternal benefit societies is vital to communities nationwide.**

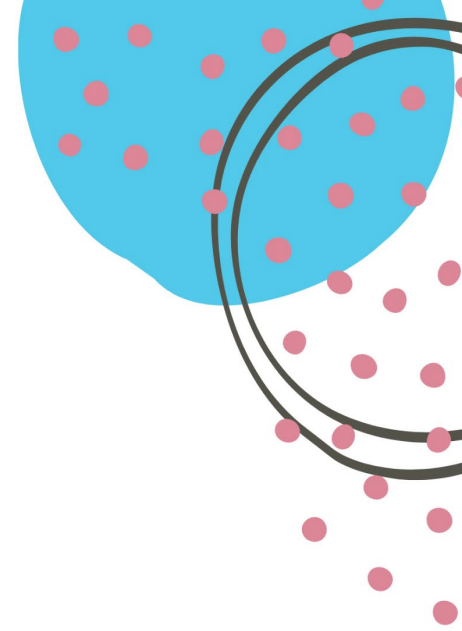
The exemption makes it possible for Modern Woodmen to mobilize volunteers and provide funds for community causes.

# Who We Are: Knights of Columbus

- The Knights of Columbus is organized as a 501(c)8 fraternal benefit society, which are membership societies organized in community-based chapters that engage in charitable works and provide life insurance products to their membership. Fraternal benefit societies use the money saved through the tax exemption to fuel charitable works providing a **76:1 return on taxpayers' investment**.
- The Knights of Columbus was founded in 1882 by Father Michael McGivney to aid the impoverished, often immigrant, Catholic families of New Haven, CT, and strengthen them in their faith. In October 2020, Father McGivney was beatified by the Catholic Church—the step prior to being named a saint.
- Today, the Knights of Columbus is a worldwide organization but continues this proud tradition through its renowned, community-based, charitable programs—programs that serve people of all faiths and walks of life.

# Building Relationships

- **Starting the conversation**
- **Setting your targets**
- **“Show don’t tell” to share the fraternal story**
- **Real-life examples of what works**





# Communicating with Policymakers

- **Explaining “fraternal”**
- **Connecting financial with community service**
- **Make the district connection**
- **Tips and tricks for effective storytelling**

# Thrivent: Selecting State Stats

# Thrivent in Wisconsin

Amplifying the power of membership for good

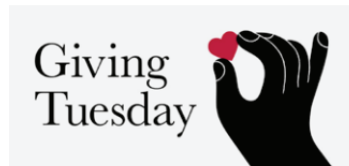
At Thrivent, we believe that humanity thrives when people make the most of all they've been given. For over 100 years, we've helped people achieve financial clarity, enabling lives full of meaning and gratitude.

As a purpose-driven financial services organization, Thrivent creates opportunities for our membership to express generosity—from providing seed money to lead volunteer activities that meet community needs, to building capacity for local and national nonprofit organizations. A few highlights of our membership answering the call to action are included below.



### Bikes and backpacks for kids

The Superior Shores Thrivent Community hosted two events last August. They partnered with the Ashland Parks and Recreation department to help families that can't afford children's bicycles. The fire department fitted children with donated helmets and the police department raffled off unclaimed bicycles, with the proceeds going to their Cops Read to Kids program. The second event was a school supply drive. Thrivent volunteers handed out 300 bags of school supplies, 300 bike helmets, over 120 backpacks and 100+ pairs of shoes to children in the community.



### Giving a lot to end hunger

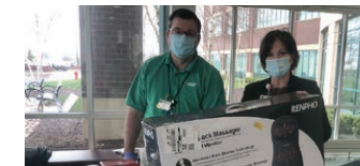
In terms of participants, dollars raised and impact across Wisconsin communities, Giving Tuesday 2020 was a huge success. With direction from the Thrivent Member Network board, Thrivent volunteers leveraged Giving Tuesday events across the state to help boost food donations during the pandemic. More than \$340,000 was raised and donated so that food banks could partner with Feed My People Food Bank (Sturgeon Bay), Second Harvest of South Wisconsin, and Feeding America East Wisconsin to make a real difference.

### Thrivent membership:

**280,649**

### Total number of volunteer activities:

**15,672**



### Taking action during COVID-19

Our "face mask warriors" initiated more than 15 Thrivent Action Teams during this time of crisis. They held drive-thru spaghetti dinners, sponsored a mental health speaker to talk to teens on the impact of COVID-19, and delivered food and other items to the elderly during long-term care facility shutdowns.

To bolster workers on the frontline, one team in Grafton packaged and delivered 80 lunches to hospital staff at Aurora Hospital. Another Grafton team purchased, collected and packaged items to be used in a respite room for nurses at the hospital.

### The Thrivent and Habitat partnership

Since 2005, Thrivent and its membership have contributed over **\$276 million** and **6.3 million hours** to build or repair more than **7,000 homes** in the U.S. and abroad.

In Wisconsin alone:

- **251** homes have been built since 2005.
- **7** more homes will be built in 2021.

Thrivent also invested **\$10,000** in two Wisconsin-based Habitat for Humanity affiliates—Door County and Wisconsin River Area—to help families stay in their homes during and after the pandemic as part of a nationwide program to assist families with temporary mortgage relief.

### Thrivent and its 280,649 Wisconsin clients with membership make a difference

Thrivent creates and supports national and local outreach programs and activities to help churches, schools, charitable organizations and individuals in need.

Thrivent outreach dollars: . . . . .	\$8,677,954
Dollars raised and donated by its membership: . . . . .	\$20,063,847
<b>Total outreach in 2020: . . . . .</b>	<b>\$28,741,801</b>
<b>Total volunteer hours: . . . . .</b>	<b>1,253,948</b>

2022 SPRING  
SYMPOSIUM

April 25-27, 2022  
The Westin Indianapolis  
Indianapolis, Indiana



# Modern Woodmen: Selecting Stats



## Nationwide contributions from Modern Woodmen: \$16.6 million

Direct contributions for fraternal activities and programs



### Nationwide events:

**23,957** social, educational and  
volunteer events

**307,985** activity participants

**230,171** hours volunteered

### Addressing food insecurity:

**498 food drives** (in  
December alone) for  
local food pantries,  
shelters, senior centers,  
schools and others



### MoneyMasters by Modern Woodmen:

Free personal financial education  
program. Teaches learners of all ages  
(kindergarten through adult) how to:

- Prepare for financial responsibilities.
- Make wise financial decisions.



### Nationwide presence:

**729,004** members

**3,234** chapters, Summit chapters  
and youth service clubs

### What is Modern Woodmen of America?

- ▼ A fraternal benefit society founded in 1883.
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# Thrivent: National

## Stepping up to fight COVID



In many ways, 2020 was a devastating year for millions of Americans. Early in the year, COVID-19 came on with a vengeance, disrupting lives and livelihoods. Thrivent moved swiftly to provide guidance and support. In addition to initiating a multitude of Thrivent Action Team projects, Thrivent and its membership raised and donated a total of **\$22 million** to support those impacted by the pandemic. In many ways large and small, our membership rose to the challenge. See the back of this page for examples from around the country.

## Responding to natural disasters



During 2020, Thrivent responded to five major natural disasters, with more than **\$300,000** raised or donated by Thrivent and its membership as well as hours of volunteer efforts to gather and distribute cleaning supplies and building materials for temporary shelters, along with food and gas. Whether from flooding in **Michigan**, tornadoes in **Tennessee**, Hurricane Laura in **Louisiana** and **Texas**, a derecho in **Iowa**, **Illinois** and **Indiana**, or wildfires in **Colorado**, **Wyoming**, **California** and **Oregon**—Thrivent membership answered the call to help people in need recover from the destruction these disasters caused.

## Addressing housing insecurity



In 2005, Thrivent and Habitat for Humanity created a unique partnership to help families in need of a safe and decent place to call home. Since then, Thrivent and its membership have:

- Contributed more than **\$268 million**.
- Volunteered over **6.2 million hours**.
- Built or renovated more than **7,000 homes** in the U.S. and abroad.

On top of this, in late 2020, Thrivent announced it is contributing **\$1 million** to help Habitat homeowners recover from the economic fallout and recession caused by the COVID-19 pandemic.

## Building financial security

We believe money is a tool, not a goal. Through values-based **financial education workshops**, we teach those we serve how to better manage money so they can focus on what really matters. Topics covered include:

- Financial harmony for married couples.
- Good money habits for children.
- Preparation for college.

Through a new program called **Money Canvas**, we provide free one-on-one coaching to help participants build better habits around budgeting, spending and saving. In 2020, the program delivered more than 900 sessions to 460 unique families. Over **60%** elected to automate part of their savings and at least **50%** reported improved confidence in their ability to manage money.

## Thrivent and its more than 2 million clients make a difference

Thrivent creates and supports national and local outreach programs and activities to help churches, schools, charitable organizations and individuals in need.

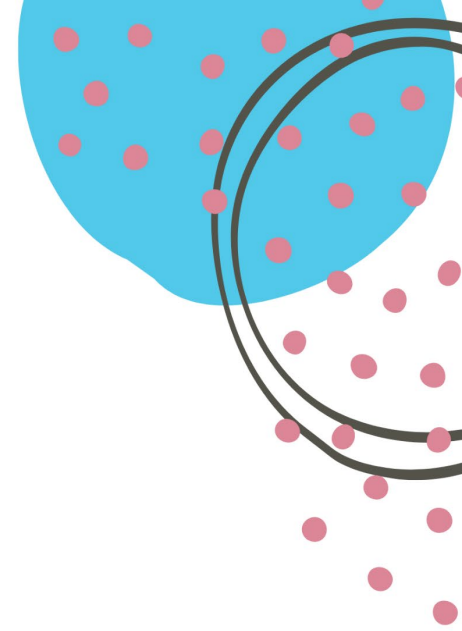
Thrivent outreach dollars: . . . . . \$83 million  
Dollars raised and  
donated by its membership: . . . . . \$125 million

**Total outreach in 2020:** . . . . . **\$208 million**

**Total volunteer hours:** . . . . . **9 million**

# Membership Growth

- **It's everyone's job!**
- **Communicating "fraternal" to prospects**
- **The agent connection**
- **Getting every department involved**



# Final Thoughts - Q&A

- What has changed the most about fraternal storytelling since you entered the industry? What are you most excited about?
- What advice would you give to a comms professional who is newer to the fraternal industry?
- Open Q&A