

# FRATERNAL LEADER



A Message from our Convention Co-Chairs, President & CEO Bill O'Toole and Sr. Vice President John Borgen

Dear Chapter Leader,

In the January issue of *Fraternal Leader*, we announced our theme for this year's convention — "Strong. Relevant. Vibrant." Now we're excited to share with you more information about the program we have planned for the Convention Weekend, September 25-27.

On Friday afternoon, delegates and their guests are invited to join us on the grounds of Marquette University for the "Friends of the Poor Fun Run / Walk," a special event to benefit our national cause partner, the Society of St. Vincent de Paul (SVdP). You can read more about the walk in this issue of *Fraternal Leader*.

Friday evening, is "All-American Night." During dinner, we'll hear from some special guests, and also present the SVdP Servant of the Poor Awards. Afterwards, the fun will really begin with a variety of musical performances, photo opportunities with scenes depicting the diverse areas of the USA represented by our chapters, mini-sports stations for delegates and guests to test their athletic abilities, and photo booths featuring famous American landmarks. And delegates will also have an opportunity to meet and chat with the candidates for our Board of Directors, while enjoying All-American brews and other festive beverages. It's sure to be fun!

On Saturday morning, you'll hear from dignitaries and a presentation regarding the State of the Society. The election of our Board of Directors will follow. And we're working to put together an afternoon program we think you'll really enjoy. A special Mass is planned for late Saturday afternoon, followed by a reception and banquet. We'll cap the evening with lively entertainment from comedian Dennis Regan, who has appeared on both *The Tonight Show* and *Late Night with David Letterman*.

Now that delegate reports have been received from our chapters, appointments will be made to the final Convention Committees. Many committees will be meeting in person or by teleconference over the summer to carry out important business in preparation for the Triennial. And in the next few weeks, we'll also be sending out the initial packet to delegates containing their hotel and meal reservation card plus other convention materials.

We look forward to seeing many of you at the Convention, and pray that all of our chapter leaders will have a safe and relaxing Summer!

Fraternally,

A handwritten signature in black ink that reads "Bill".

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A handwritten signature in black ink that reads "John".

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# Summary of Fraternal Leaders Advisory Group (FLAG) Teleconference Call - May 7, 2015

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At this meeting, the group discussed the following:

- An update on the status of chapter delegate elections and next steps, including the first mailing to be sent to delegates in mid-late June.
- Plans for a meeting of FLAG to take place on the morning of September 25, at the convention hotel. More details will be shared at the July meeting of FLAG.
- An overview of activities planned for Friday afternoon and evening of the Convention. This will include the Society of St. Vincent de Paul Friends of the Poor Fun Run/Walk to be held at 2 PM on Friday, September 25, on the campus of Marquette University.
- Review and discussion of FLAG appointees to Convention Committees. FLAG will provide appointments to the final two Convention Committees at the meeting in July.
- FLAG members were asked how they feel members “experience” Catholic Financial Life. The group felt that members do this through their advisor, through the activities sponsored by chapters, and through our member benefits. In order to grow, they felt that we need to strengthen the relationship between advisors and members, and always ensure that members have a positive experience when interacting with our organization.
- Members of FLAG were asked to provide ideas for new member benefits, and to consider how the Society can recognize and reward members at various milestones anniversaries.
- The Michael James Mette concert series was well-received, with one concert in Texas and four in Wisconsin. Four more concerts are scheduled for the New England area in fall, and Michael will also perform at the upcoming Triennial Convention.
- There are many upcoming regional summer events to which members and their families have been invited.
- The next FLAG meeting is scheduled for Thursday, July 16, at the home office.

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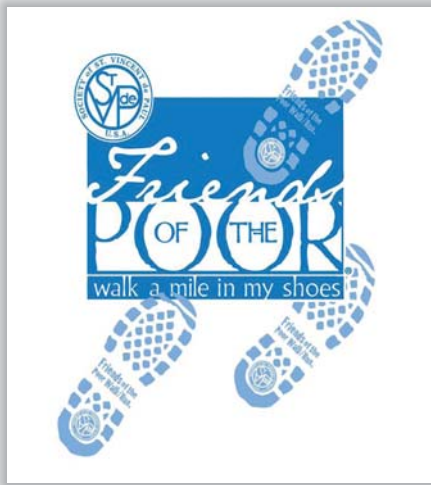


One way you can help spread the word about Catholic Financial Life, and show your support for our organization and the work we do, is to “Like” us on Facebook. But you can also go one step further by “Sharing” our posts on your own page with friends and family. It’s easy to do, and could help attract members and build support for our initiatives.

And while we’re on the subject of sharing, please remember to send us high quality digital photos from your chapter activities. We review all photos submitted for inclusion in the magazine, other printed material, and conference presentations. Send your photos to: [chapterphotos@catholicfinanciallife.org](mailto:chapterphotos@catholicfinanciallife.org). Thank you!



## Convention to Start Off on the Right Foot with Fun Run and Walk



This year's Triennial Convention will begin with something a bit different but very worthwhile. During a special Friday afternoon edition of the Society of St. Vincent de Paul annual "Friends of the Poor Walk," delegates and guests will help raise much-needed funds for the organization that is Catholic Financial Life's national partner in helping meet the needs of the poor.

Expanded to include a fun run as well as the usual leisurely stroll, the event will showcase the beautiful campus of Marquette University, including the one-of-a-kind Saint Joan of Arc Chapel. And if you just want to show support for the cause by attending the event without participating in the walk, that's perfectly fine! Joining the delegates will be university students and faculty, St. Vincent de Paul personnel and volunteers, home office associates, as well as interested

Milwaukee-area residents. Leading off the fun run and walk will be David Barringer, President and CEO of the National Council of the U.S. Society of St. Vincent de Paul; Dr. Michael Lovell, President of Marquette University; as well as our own President and CEO, Bill O'Toole.

Shuttles will transport delegates from the Hilton Hotel to the Marquette Campus beginning at 12 noon. The event will kick off at 2 p.m., and delegates will be returned to the Hilton by 4 p.m., with plenty of time for everyone to get ready for the Friday evening festivities.

## Help Us Grow and Earn Your Chance to Dine With Our Leaders

In order for any organization to remain Strong, Relevant, or Vibrant, it must grow. Catholic Financial Life is diligently working to recruit more advisors and brokers, in order to service our existing members better and to reach more potential members. We're updating our technology to meet the needs of today's families and to make it easier for people to join our organization. And we're launching a multi-channel effort to add new members. You can be part of this effort by recommending Catholic Financial Life to your family and friends!

Enclosed is a flyer for you to provide us with the names of those you'd like to refer. And don't forget that for every person you recommend who becomes a financial member, you will receive a \$10 gift card under our Member-to-Member Program! And as a special incentive to our convention delegates, those who make the most referrals between now and the convention will have the opportunity to join Chair of the Board Bob Dippold, Bishop Louis Gelineau and President Bill O'Toole for dinner on Saturday night at the Triennial Convention. Please be sure to note that you are a delegate on each referral you submit!



*President Bill O'Toole (left), with fellow Board Members Archbishop Jerome Listecki and Dr. Patrick Murphy at a recent charity event.*

# Time for Your Chapter Mid-Year Checkup



We're just about halfway through the year, and now is a great time to review your chapter's schedule of activities for 2015 to determine if you're on track to receive maximum funding for 2016. We've included the Chapter Funding Chart for reference. If you're not certain where you stand, or if you need advice for activities to meet certain categories, contact the Fraternal Department for assistance.

## Activity Funding

| Member Count Minimum | Member Count Maximum | Number of Activities |           |           |           |            |
|----------------------|----------------------|----------------------|-----------|-----------|-----------|------------|
|                      |                      | 4                    | 6         | 8         | 10        | 12         |
|                      |                      | Base                 | Base +25% | Base +50% | Base +75% | Base +100% |
| 3,001                | 10,000               | \$4,000              | \$5,000   | \$6,000   | \$7,000   | \$8,000    |
| 2,001                | 3,000                | \$3,000              | \$3,750   | \$4,500   | \$5,250   | \$6,000    |
| 1,501                | 2,000                | \$2,000              | \$2,500   | \$3,000   | \$3,500   | \$4,000    |
| 1,001                | 1,500                | \$1,500              | \$1,875   | \$2,250   | \$2,625   | \$3,000    |
| 751                  | 1,000                | \$1,300              | \$1,625   | \$1,950   | \$2,275   | \$2,600    |
| 501                  | 750                  | \$1,100              | \$1,375   | \$1,650   | \$1,925   | \$2,200    |
| 251                  | 500                  | \$900                | \$1,125   | \$1,350   | \$1,575   | \$1,800    |
| 101                  | 250                  | \$700                | \$875     | \$1,050   | \$1,225   | \$1,400    |
| 1                    | 100                  | \$500                | \$625     | \$750     | \$875     | \$1,000    |

| # of Activities | Activity Funding   |
|-----------------|--|
| 12              | Base +100%<br>Max (3) social   |
| 10              | Base +75%<br>Max (3) social  |
| 8               | Base +50%<br>Max (2) social  |
| 6               | Base +25%<br>Max (2) social  |
| 4               | Starting Base<br>(1) Activity in each category:<br>• (1) educational<br>• (1) religious<br>• (1) civic<br>• (1) social |

If you have any questions regarding topics in this newsletter, please contact:

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