



2024 ANNUAL REPORT OF THE EXECUTIVE SECRETARY, COO

MARCH 22, 2025

Father Thomas Nasta, Mr. President and Members of the Board of Directors, it is my pleasure to present my 2024 Annual Report.

Home Office Staff:

I would like to thank the Home Office staff who went above and beyond this year. They truly care for our Society and are dedicated to help serve our Members with anything they need. The Home Office welcomed several new staff members to the team to help advance our goals. We have shifted some roles and responsibilities of our staff and they have all risen to the challenge.

We are having monthly team meetings for training and to discuss current and future projects.

Rebranding:

One of our large projects this year was our rebranding. All stationary, forms, promotional materials and our website were rebranded. This was an important task and everyone stepped up to provide information to ensure accuracy for their departments.

Gift Shop:

We developed a gift shop where members can purchase FCSU logo wear. It has been integrated into the new website seamlessly. All profits will be used to help the scholarship fund.

Advertising:

We continue to work with our local television station Fox 8. We are the Fox Financial Sponsor and our contract includes one interview per week during their "New Day Cleveland" segment, 30-second commercials airing during their news hours and streaming of our commercials in their app and on Facebook. We have discussed expanding our commercials into different markets utilizing their sister companies.

Some results include 12,394,245 on-line impressions and 687 commercials aired. Just this week, we had two Slovak non-members stop in the office because of seeing an ad on television. They donated items for the museum. We gave them sales materials and will follow up soon.

Developing Branch and Agent Relationships:

As you are aware, we are heavily working on recruiting new agents to bring in new members. Our goal is to turn new members into active fraternal members. We are developing a strategy to introduce these new members to branches.

We are sensitive to agent's commission and are working on a policy to grandfather agents into any future commission if this member buys a product through the branches or home office.

Remodeling Project:

The office underwent a complete remodel that finished in early 2024. We are all pleased with the results as it fosters a professional work environment for our staff and members who visit.

TV monitors were purchased during the course of the remodel. They are used in the board room for training purposes and zoom meetings. The President and Executive Secretary also have TV monitors so they can stay updated on current events, financial markets, bonds and treasury data.

Reports and Tracking:

- Developed Economic Review per Region Report. The information includes:
 - ▶ \$ per region
 - ▶ \$ per insurance/region
 - ▶ \$ per annuities/region
 - ▶ Members per region
 - ▶ Members by annuities
 - ▶ Members by insurance
- Developed a daily tracking form for the annuity department of money coming in versus what is going out.
- Developed a daily tracking form for death claims on money in the process of going out and status of claim process.
- Developed a phone tracking form to gauge success from marketing campaigns.
- Developed a weekly tracking form for the insurance department to determine the type of insurance product sold and how the client heard about FCSU. Was it sold by an agent, a branch or through our marketing campaign?
- Developed a monthly form provided to Regional Directors that include important updates at the Home Office. Talking points come from the President and Executive Secretary. It can be found on the portal and Regional Director's are encouraged to share the information at branch and district meetings.

Agent Licensing Project:

We worked with our software provider, PinPoint, to create coding to give an alert if an Agent or Recommender was no longer licensed or up to date on requirements. The screen will freeze and not allow a policy to be issued. We follow up with agents to get their licenses reinstated.

For recommenders in Pennsylvania, we apologize for any issues you might had trying to get your license up to date. FCSU has to stay in compliance with PA state laws, which requires every recommender to have current credentials.

Monthly Newspaper Contests:

We started including a Search-A-Word puzzle contests in the monthly newspaper. The members have responded positively and we routinely receive 200 or more entries. The benefits of these puzzles include:

- Gathering updated information for members such as email and correct addresses.
- Generating contact with non-members who fill out the form by sending them our monthly digital newsletter.

Travel and Fraternal Representation:

- I had the opportunity to attend conferences with other fraternal organizations to strengthen our partnership with other organizations.
- Attended the Slovak Pro event in New York City where I met Slovak president, Peter Pellegrini.
- Made two trips to the Czech-Slovak Museum in Iowa where I met with Dr. Cecila Rokuskek, President and CEO of the museum to establish a working relationship. President of the Slovak Institute, Milan Kobulsky accompanied me on one trip.
- Elected to the FFMA Board of Directors
- American Fraternal Alliance Conferences

Current and Upcoming Projects:

- Slovak Pro is a networking group for Young Slovak Professionals. We want to get more involved in their organization and encourage them to have outlets in the Cleveland and Pittsburgh area. This would help or members network with other Slovaks and help draw younger members into the Society.
- Talking with a Florida company with access to 5,000 independent agents across the country. We are working with them to recruit new agents.
- Working with a Philadelphia school district to promote our scholarship program.
- Starting once a month zoom calls for agents to discuss marketing campaigns, commission structures and sales incentives. We will also brainstorm their ideas on how to better market our products.
- Starting once a month zoom calls for branches and districts to go over success stories, challenges and answer questions.