



Endowment for Free Methodist Ministries

A Gift that Keeps on Giving...

When you establish an endowment with FM Financial (FMF) you can be assured that it will produce income for ministry - forever. Long after you are gone, your gift will still be giving!

How Does an Endowment Work?

Endowments can be established with present gifts or through planned gifts such as a will or trust. The funds for each endowment are irrevocably deposited with FMF and invested to provide current income and principal growth. A significant portion of the annual income of the endowment is distributed to the ministry or ministries designated by the donor. Such payouts generally begin once the fund exceeds \$7,500. Undistributed income is added to the principal of the endowment, thereby growing the endowment over time.

Additional funds may be added to an existing endowment by you or others at any time to increase the principal and future income to benefit ministry.

What Does It Cost?

There are no fees to establish an endowment.

How Do I Get Started?

If you want to establish an endowment as a part of your estate plan you will need to create the endowment declaration while you are living and leave instructions in your will or trust regarding the funding of the endowment. At your death, the appropriate funds will be gifted to FMF and the endowment will become active.

You may also establish an endowment with an outright gift during your lifetime to benefit your local church, a new church plant, an educational institution or scholarship, human service ministry, Free Methodist missions, or a host of other ministries. If the endowment is fully funded during your lifetime the income would begin to benefit ministry even while you are still living.

How Do I Apply?

Please complete the attached application to begin the process of establishing your new endowment. You can also contact us for further information. Your endowment will be the "Gift that Keeps on Giving!"



8050 Spring Arbor Rd., Spring Arbor, MI 49283 • 800-325-8975

Endowment for Free Methodist Ministries-New Account Form

1. Endowment Donor or Organization Information

Donor or Organization Name

Social Security # or Federal Tax ID#

Mailing Address

City State Zip

Primary Contact Person

Secondary Contact Person

Phone Number

Phone Number

E-mail Address

E-mail Address

Fax Number

Fax Number

2. Endowment Funding Information

What is the recommended name for this endowment? _____

When will the endowment be funded? ☐ Currently (as noted below) ☐ By Will ☐ By Trust

What is the funding source for this endowment? ☐ Check ☐ Securities ☐ Real Property ☐ Other _____

Approximate amount of initial funding (if less than \$7,500, contact EGP office): _____

Will you be investing additional dollars in the future? ☐ Yes ☐ No (Explain) _____

3. Endowment Declaration Questions (Please attach blank sheet if additional space is needed to answer questions.)

Why do you wish to establish this endowment?

Is there a particular person(s) you are honoring or memorializing with this endowment?

How many years have you (or your honoree) been associated with the ministry(ies) you wish to benefit?

How did you (or your honoree) become acquainted with the ministry(ies)?

How are you (or your honoree) currently involved with the ministry(ies) that will benefit from this endowment?

Have you (or your honoree) been involved in any other ministries? (For example, did you (or your honoree) attend a Free Methodist college/university or participate in mission trips, etc.?)

Is there anything else you (or your honoree) would like us to include in the biographical sketch in the Endowment Declaration regarding your relationship to Christ and/or the ministry(ies) the endowment is supporting?

4. Endowment Distributions

Distributions will be made at least annually to the charitable organizations named in the Endowment Declaration in accordance with the published guidelines of the Endowment for Free Methodist Ministries (EFMM) of FM Financial. EFMM Guidelines are available upon request.

What charitable organizations will benefit from this endowment? (Please at least one Free Methodist ministry.)

_____ % to _____	Address: _____
_____ % to _____	Address: _____
_____ % to _____	Address: _____
_____ % to _____	Address: _____
_____ % to _____	Address: _____

5. Donor or Organization Signature(s)

My/our signature is affixed below to indicate that I/we have completed the application in its entirety and desire to establish this *irrevocable* endowment with FM Financial under the Endowment for Free Methodist Ministries.

Signature

Date

Printed Name

Title (if applicable)

Signature

Date

Printed Name

Title (if applicable)

Not FDIC-insured. No bank guarantee. May lose value.

6. Please mail completed application to:

Regular mail:

FM Financial
PO Box 580
Spring Arbor, MI 49283

Express Mail:

FM Financial
8050 Spring Arbor Road
Spring Arbor, MI 49283

Contact Us:

www.fminancial.org
Phone: (800) 325-8975
Fax: (517) 750-2752

This area for internal use only:

Account Type: _____	Critical Date: _____
Performance Statement: <input type="checkbox"/> Yes <input type="checkbox"/> No	First Rate Tier: <input type="checkbox"/> 1 <input type="checkbox"/> 2
Discretion: <input type="checkbox"/> Full <input type="checkbox"/> None	Review Month: _____
Investment Objective: _____	PRS Code: _____
Portfolio Management Fee: _____ %	Schedule #: _____
Comments: _____	