fm financial

stewardship well done

planning • investing • giving

FM Financial offers a full range of services to individuals and organizations in the areas of financial planning, retirement planning, estate planning, investment management, gift administration, legacy strategies, and loans to qualified churches. But what truly sets us apart is that everything we do is motivated by biblical stewardship principles. To illustrate this, we have created a unique tool for our clients called the *Stewardship Well Done Journey.*

Whenever you engage with FM Financial, you will interact with qualified professionals, none of whom are paid by commissions. You can have peace of mind knowing you can trust us with your questions and that we always have your best interests in mind.

Wherever you find yourself on your journey, we would love to help you take your best next step. Contact us for a free consultation. Today is the right time to begin the conversation.

FM Financial is the financial services ministry of The Free Methodist Church – USA. We are a 501(c)(3) nonprofit supporting organization and also operate a for-profit subsidiary, GuideStream Financial, which is a full-service Registered Investment Adviser (RIA) firm. We fully embrace the values of The Free Methodist Way, endeavoring to live them out in our business practices and empowering our clients to do the same.

FM FINANCIAL can help you with:

PLANNING

- Estate Planning – get your essential documents in place (will/trust and powers of attorney)
- Retirement Planning – specifically learn if you are on track for retirement
- Financial Planning – gain a comprehensive view of your financial health
- Legacy Planning – strategize to maximize your impact on the people and ministries you love

INVESTING

- Investment accounts – full range of retirement and non-retirement accounts*
- Investment management – portfolio options ranging from conservative to aggressive*
- Unique investment opportunity – earn interest while helping churches grow**
- Services for both individuals and organizations

GIVING

- Build on your faithful tithing – take your giving to the next level
- Maximize impact – use well-established, tax-wise methods of giving
- Give strategically – see your goals become a reality during your lifetime and beyond
- Leave a legacy – tell your story and God's story through your finances

*offered through GuideStream Financial

**offered through FM Financial's Free Methodist Investment and Loan Fund; not authorized in all states

CONTACT US TODAY!

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STEWARDSHIP WELL DONE JOURNEY

PRIORITIES

Determine what life priorities matter most.

ESSENTIAL DOCUMENTS

Draft a basic estate plan including a will/trust and powers of attorney.

RETIREMENT

Make monthly contributions to capture all 401(k) and 403(b) matching funds.

SAVE

Set aside more for retirement, education, future purchases, and charitable opportunities.

LEGACY

Use proven gifting strategies to maximize your impact on the people and ministries you love.

BUDGET

Prepare and follow a budget that includes tithing and giving all along the way.

EMERGENCIES

Assess insurance needs and build/maintain 3-6 months of living expenses.

DEBT

Pay off all credit card and consumer debt.

PLAN

Engage a professional for financial planning and investment management.