

# STEWARDSHIP WELL DONE

FM Financial provides professional planning, investing, and giving services for individuals and organizations from a biblical perspective.

## Services for **Individuals**



### PLANNING

- ✓ Comprehensive Financial Planning
- ✓ Focused Retirement Planning
- ✓ Charitable Estate Planning



### INVESTING

- ✓ Retirement Accounts
- ✓ Non-retirement Accounts
- ✓ Investment Portfolios Ranging from Conservative to Aggressive
- ✓ Unique Investment Opportunity that Helps Churches Grow



### GIVING

- ✓ Tax-Wise Giving Strategies
- ✓ Assistance Giving Appreciated Assets
- ✓ Donor Advised Funds
- ✓ Life Income Agreements

## Our Goal Is For You To **Experience...**

**HOPE** that comes from planning with purpose and taking steps to accomplish your God-given calling when it comes to your finances.

**PEACE** that comes from investing with discipline to reach your goals in the midst of an ever-changing financial environment.

**JOY** that comes from giving generously to the people and ministries you love. It's the most gratifying experience you can have with money!



# WHAT WE DO FOR INDIVIDUALS

At FM Financial, we believe living a life of *Stewardship Well Done* involves **planning with purpose, investing with discipline, and giving with joy**. Each of the services we offer is designed to help you excel in these areas. Together they lead to hope, peace, and joy as you thoughtfully steward the assets God has entrusted to your care.



## PLANNING

Planning with purpose lays the foundation for responsible and effective stewardship of resources. Our comprehensive financial planning, focused retirement planning, and charitable estate planning services can help set you on the right course during life, provide stability in times of incapacity, and provide for the people and ministries you love after death.

- ✓ Comprehensive Financial Planning
- ✓ Focused Retirement Planning
- ✓ Charitable Estate Planning



## INVESTING

Investing with discipline based on a long-term financial plan provides the best opportunity for effective long-term stewardship. Our wide array of retirement and non-retirement account options can be tailored to meet your unique needs and help you enact the plans you have put in place.

- ✓ Retirement Accounts
- ✓ Non-retirement Accounts
- ✓ Investment Portfolios Ranging from Conservative to Aggressive
- ✓ Unique Investment Opportunity that Helps Churches Grow



## GIVING

Giving with joy is a transformative act that is the privilege, and duty, of the faithful steward. We can introduce you to tax-wise giving strategies that help you determine the best asset to give, the best timing for your gift, and the best giving method to use.

- ✓ Tax-Wise Giving Strategies
- ✓ Assistance Giving Appreciated Assets
- ✓ Donor Advised Funds
- ✓ Life Income Agreements

For more information, visit [fmfinancial.org](https://fmfinancial.org) or scan the QR code.

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