SERVICES FOR ADVANCEMENT TEAMS

When donor relationships open the door to generous giving conversations, FM Financial offers the resources and technical expertise needed to strengthen donor confidence and bring significant gifts across the finish line. As you connect with constituents, share your vision, and inspire generosity, our credentialed experts are ready to help you and your donors answer questions such as:

- What method of giving best fits my unique circumstances?
- What is the right timing for my gift?
- What tax benefits are available to help maximize my gift?
- What size/type of gift can my financial situation realistically support?

In many cases, we are also able to facilitate the gift, providing tax documentation, and ongoing gift administration as needed. Our team of dedicated Christian financial professionals has many years of experience with complex gifts and maintains relationships with industry experts (legal, tax, accounting, etc.) who can assist when needed. We look forward to partnering together to accomplish more for Kingdom purposes.

Unique Gifts Beyond Cash

Deciding what to give and how to give it are the two main issues donors face. Our team is available to meet with you and your donor(s) to answer questions about various tax-wise giving methods. We have facilitated numerous gifts of appreciated securities, rental properties, farm properties, business interests, unique collectibles, and many more.

Charitable Remainder Unitrusts and Charitable Remainder Annuity Trusts

We have an experienced team ready to assist with all aspects of charitable remainder unitrusts (CRUTs) and charitable remainder annuity trusts (CRATs). We can provide donor illustrations and facilitate conversations to help donors discover how a CRUT or CRAT could be beneficial in their unique circumstances.

If a CRUT or CRAT is right for your donor, we have relationships with attorneys to draft the necessary documents. We are also experienced in facilitating the gift process to fund the trust and provide the tax documentation needed to claim a deduction.

After signing, we offer services to administer the trust, including investment services, distributions to current beneficiaries, tax reporting, and full distribution upon maturity.

*In order to provide a fully array of professional services while remaining compliant with various financial service industry regulations, some services are offered through the Free Methodist Investment and Loan Fund, GuideStream Financial, and GuideStream Charitable Gift Fund.

SERVICES FOR ADVANCEMENT TEAMS

Estate Planning

Our estate planning team has over 50 years of experience working with donors and documents. They can facilitate conversations to help donors learn the various aspects of estate planning and how your organization can be included. We maintain relationships with Christian attorneys who have a heart for organizations such as yours and offer their services at a discount.

Financial Planning

When considering present or future gifts, donors often want to know how the gift might affect their overall financial circumstances. Credentialed financial advisers are available to your donors through our wholly-owned subsidiary, GuideStream Financial. They offer a complimentary financial plan to help donors see their complete financial picture in order to make wise decisions. In this process, donors might discover they have more margin to give than anticipated.

Donor Advised Funds

Giving through a donor advised fund continues to grow in popularity. Donors who have a donor advised fund tend to be generous, committed, and consistent givers. Through our relationship with GuideStream Donor Advised Funds, we provide the opportunity for your donors to open their own donor advised fund and establish a family legacy of giving.

Seminars and Workshops

Our team is available to conduct seminars and workshops with your donors on topics such as retirement planning, estate planning, and various gifting methods. Offering educational opportunities on relevant financial topics contributes to the relationships and trust you are building with your donors.

Mark Olson
President
Chief Executive Officer

Chris DeBacker
Vice President
Estate & Gift Planning

Carol Duberowski
Director of Regional
Partnerships - West

Kirk Hoffman
Vice President
Financial Planning

Stephen Macaluso
Director of Regional
Partnerships - East

Scan the QR code or visit www.fmfinancial.org/team to meet our entire team.