

# SERVICES FOR CONFERENCES AND LOCAL CHURCHES

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As a conference or local church, you serve on the front lines of ministry every day. But you can't do it alone. Acts 6:2-3 states, "And the twelve summoned the full number of the disciples and said, 'It is not right we should give up preaching the word of God to serve tables. Therefore, brothers, pick out from among you seven men of good repute, full of the Spirit and of wisdom, whom we will appoint to this duty.'"

***At FM Financial, we believe our calling is to come alongside frontline ministries with professional financial services that allow you to more fully lean into the mission of bringing wholeness to the world by loving God, loving people, and multiplying disciples.***

The following planning, investing, giving, and loan services are offered with the goal of helping conferences and local churches, as well as their constituents, become better stewards of all God has entrusted to their care. Financially healthy families, churches, and conferences position our denomination for greater Kingdom impact at home and around the world.

## PLANNING

### Estate Planning

Estate gifts are valuable resources for long-term health and sustainability. Our estate planning team has over 50 years of experience working with donors and documents. They can meet with you and your donor(s) to discuss various aspects of estate planning and how conference ministries and local churches can be included. We maintain relationships with Christian attorneys who have a heart for the Free Methodist Church and offer their services at a discount.

### Financial Planning

Credentialed financial advisers are available through our wholly-owned subsidiary, GuideStream Financial. They offer a complimentary financial plan to help your constituents see their complete financial picture in order to make wise stewardship decisions. Equipping families to be better stewards increases their ability to be generous; in fact many discover they have more margin to give than anticipated.

### Seminars and Workshops

Our team is available to conduct seminars and workshops with your pastors and congregants on topics such as individual stewardship, retirement planning and estate planning. Offering educational opportunities on relevant financial topics contributes to overall financial health and generosity.

\*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.

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### INVESTING

#### Investment Accounts for Organizations

We offer investment accounts tailored for the needs of ministry organizations. These include fixed rate options as well as portfolios that are fully diversified across the major asset classes. Our process includes helping you review or craft an Investment Policy Statement (IPS), implementing the appropriate investment strategy and asset allocation, and ongoing monitoring with industry-leading reporting. We have a dedicated team of credentialed advisers, consultants, and operations specialists focused on helping organizations like yours be more effective in achieving their missional goals.

#### Endowments

We currently manage endowments for various ministry organizations totaling over \$32 million. Last year these endowments distributed over \$1.1 million. We would love to talk with you about setting up an endowment to benefit your organization.

#### Retirement Accounts for Employees

We can help you support your staff by providing retirement solutions like a 403(b) plan and individual retirement accounts (IRAs). Through these accounts, your staff will also have access to our GuideStream financial advisers, if desired.

#### Investment Accounts for Individuals

As your constituents each travel on their own stewardship journey, we offer various retirement and non-retirement investment accounts, ranging from conservative to aggressive, to help them along the way. Account holders can work with an investment manager and advisers who care about mission and stewardship as much as returns and retirement.

### GIVING

#### Major Gift Planning and Administration

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. In many cases, we are also able to facilitate the gift (e.g. appreciated real estate, appreciated securities, etc.) and provide the necessary tax documentation. We also offer trust administration for charitable trusts.

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### Donor Advised Funds (DAF)

Donor advised funds continue to grow in popularity as a simple, flexible, and tax-wise way for donors to manage all of their giving. Essentially a giving investment account, a DAF allows donors to make contributions to their fund and receive an immediate tax deduction. Contributions grow tax-free until the donor is ready to recommend grants to a wide variety of qualified ministries and charitable organizations, including conference ministries and local churches. *Donors who have a DAF 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 DAF and establish a family legacy of giving.

### FREE METHODIST INVESTMENT AND LOAN FUND

We offer loans to Free Methodist ministries across the country. We are experienced in working with ministry organizations and their unique financial needs and requirements. Loans may be used to construct new facilities; to renovate, remodel, expand, or replace existing facilities; to purchase building sites; to refinance existing loans; or to meet other capital or operational needs. Free Methodists have worked together for decades to provide this service. It is only possible through Kingdom-minded investors who earn a competitive rate of return on their investments.



**Mark Olson**  
President  
Chief Executive Officer



**Josh Adams**  
Chief Operating Officer  
Vice President - FMLF



**Chris DeBacker**  
Vice President  
Estate & Gift Planning



**Scott Blakemore**  
Senior GSF Adviser  
Institutional Investments



**Carol Duberowski**  
Director of Regional  
Partnerships - West



**Stephen Macaluso**  
Director of Regional  
Partnerships - East



Scan the QR code or visit  
[www.fmfinancial.org/team](http://www.fmfinancial.org/team) to  
meet our whole team.