CHARITABLE ESTATE PLANNING WORKSHOP

Establishing a Living and Lasting Legacy

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. From time to time we conduct workshops to help educate and prepare you for various experiences along your financial journey.

Good stewardship involves planning for times when you might be incapacitated and not able to care for your financial or health care needs. It also involves documenting your wishes for what happens to your estate when you pass away. Creating an estate plan may be the biggest stewardship decision you make.

Thoughts about these issues often make us uncomfortable; but peace of mind comes when you take time to have the difficult conversations and get some essential documents in place. FM Financial can help you approach estate planning from a biblical perspective and consider how God might be calling you to use your estate to not only provide for your loved ones, but to continue contributing to the Kingdom causes you supported during your lifetime. The ordinary act of getting your essential documents in place can become an extraordinary act of generosity for Kingdom purposes!

WHAT TOPICS WILL BE COVERED IN THE WORKSHOP?

- What documents are typically part of an estate plan?
- What makes an estate plan extraordinary?
- What are the benefits of giving through my estate?
- What are the best strategies for giving through my estate?
- How can I engage my family in my charitable giving plans?

Scan the QR code or visit
www.fmfinancial.org
to see our schedule of upcoming
workshops and get registered.

CHARITABLE ESTATE PLANNING WORKSHOP

Establishing a Living and Lasting Legacy

HOW CAN I ATTEND THE CHARITABLE ESTATE PLANNING WORKSHOP?

Check out our schedule of upcoming workshops (virtual and in person) at fmfinancial.org and register for the date that fits your schedule. Whether you attend virtually or in person, you'll receive the same valuable guidance and insights to help with your estate plan.

WHAT TO EXPECT DURING THE WORKSHOP:

- The 60 minute workshop will start promptly on time; following the presentation, there will be Q & A.
- You will be provided with a workbook.
- You will likely have some homework to do after the workshop in order to apply the material to your unique circumstances ... but don't worry, we will prepare you to complete it successfully!

HOW SHOULD I PREPARE FOR THE WORKSHOP?

If you currently have estate planning documents, it would be good to review them. It will also help for you to have a basic inventory of your assets / liabilities. Begin thinking of the people you want to involve in your estate plan, as well as the people and ministries you may wish to benefit.

WHY SHOULD MY CHURCH OFFER AN ESTATE PLANNING WORKSHOP?

More than 60% of American die without an estate plan; less than 10% of those with an estate plan use it to make gifts to ministry. Offering this workshop promotes good stewardship by putting essential documents in place to provide for the people you love. It also provides an excellent opportunity to make transformative gifts to the church and other ministries. These gifts provide long-term support and leave a legacy of faith and generosity for future generations.

HOW CAN I SCHEDULE A WORKSHOP FOR MY CHURCH?

If you are interested in hosting a virtual or in-person workshop for your church, please contact us at info@fmfinancial.org or (800) 325-8975. We will put you in contact with one of our Directors of Regional Partnerships (East - Steven "Mac" Macaluso; West - Carol Duberowski).

FM Financial is the financial services ministry of FMCUSA. We offer professional planning, investing, and giving services for individuals and organizations from a biblical perspective.