

It is a privilege to meet with you at General Conference 2023! As a ministry partner of FMCUSA, we are honored to share with you how God has used FM Financial since we last met. It is our privilege to work with Free Methodists across the country to help them live a life of **STEWARDSHIP WELL DONE** in the areas of planning, investing, giving, and through the loan fund.

In addition to the ministry highlights included with this report, one of the most significant developments at FM Financial has been the creation of the **STEWARDSHIP WELL DONE JOURNEY**. It consists of nine waypoints designed to position your finances around biblical stewardship principles. We encourage you to take the assessment on our website and find out what your best next step might be on your own personal **STEWARDSHIP WELL DONE JOURNEY**. As each of us becomes a better steward of what God has entrusted to our care, the more we can accomplish together!

All we have, all we possess, and all we can do are gifts from God given to accomplish His purposes in the world through us. All glory belongs to God for the work He allows FM Financial to participate in to further His Kingdom.



Mark B. Olson

Mark Olson,
President & CEO



PLANNING:

- Helped **824 families** with estate planning documents resulting in **\$50.8 million** designated to ministry through wills and trusts (revocable bequests)
- Served **342 families** through our financial planning process



INVESTING:

- Opened **481 new diversified investment accounts** for individuals and organizations totaling \$37.6 million
- Grew investments in the Free Methodist Investment and Loan Fund by **\$22.4 million**
- Grew endowments and charitable trusts by **\$10.6 million**



GIVING:

- Assisted donors with gifts of cash, securities, real estate and qualified charitable distributions to ministries totaling **\$22.7 million**
- Facilitated **\$13.2 million** in gifts to various ministries from matured estates
- Distributed over **\$3 million** to ministries from existing endowments



LOANS TO FM MINISTRIES:

- Facilitated **52 new loans** to FM churches and ministries
- Disbursed over **\$47.2 million** in loans to FM churches and ministries

stewardship well done Journey

fmfinancial.org

Priorities

Determine what life priorities matter most.



Budget

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



Essential Documents

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



Emergencies

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



Retirement

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



Debt

Pay off all credit card and consumer debt.



Save

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



Plan

Engage a professional for comprehensive financial planning and investment management.



Legacy

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



While other financial service providers talk about wealth accumulation, FM Financial talks about living a life of Stewardship Well Done. To help explain what we mean, we have developed a unique tool called the **Stewardship Well Done Journey**. It consists of nine waypoints designed to position your finances around biblical stewardship principles and lead to the realization that wise stewardship results in freedom and joy in Christ. Each journey is unique. Wherever you find yourself today, we would love to help you take your next step. There's always room for more travelers on the **Stewardship Well Done Journey**. We're so glad you've joined us.



We invite you to take the **Stewardship Well Done Journey Assessment** on our website. This tool helps you evaluate where you are on your personal financial journey and can help you identify what your best next step might be.