

Who we are: FM Financial

Our Mission: Provide professional guidance and investment management from a Biblical perspective

Our Vision: Stewardship Well Done

Our Purpose: To advance the Kingdom and support the mission of the Free Methodist Church

What we do:

1. Planning (Personalized financial analysis, Investment strategy assessment, Retirement planning, Estate planning, Legacy planning)
2. Investing (Investment and Loan Fund, Emergency funds, Diversified portfolios, Personalized investments, Retirement savings, Institutional investments)
3. Giving (Gift Administration with Cash and Stocks, Real Estate & Other Assets)
4. Loan to Ministries of FMC USA (Loans to Free Methodist Ministries)

What we are: A trusted guide

FM Financial was founded in 1986 to provide professional guidance and investment management from a Biblical perspective. With assets under management now exceeding \$560 million, we offer a full range of services in the areas of financial planning, investing and giving; plus loans to qualified ministries of the Free Methodist Church. Each member of our team is a qualified professional who cares about stewardship and mission as much as retirement and returns. By leading with a Kingdom mindset, applying exemplary business practices, and serving with excellence, we are committed to helping you faithfully manage the resources entrusted to your care.

How we do it: The Stewardship Well Done Journey

The Stewardship Well Done Journey Assessment and materials will become the on ramp for people in all different stages to engage with us.

1. Priorities
2. Budget
3. Essential Documents
4. Emergency Fund
5. Retirement
6. Debt
7. Save
8. Plan
9. Legacy

Call to Action

Wherever you find yourself on the journey, we would love to help you take the next step. Contact us for a free consultation. Today is the right time to begin the conversation.

Desired Outcome for Our Clients

- Your life priorities will be clarified
- Meaningful legacies will be built
- A 'Stewardship Well Done' life

