



FM Financial is the financial services **ministry** of The Free Methodist Church USA. We consider each **partnership** with Free Methodist conferences, local churches, families, and individuals to be a trusted relationship.

Partnership is not a word we take lightly.

We genuinely want to come alongside you as a trusted friend and adviser. Our financial services in the areas of planning, investing, giving, and loans to churches are offered to enable and empower you to focus on your unique God-given calling and mission.

We also do not use the word ministry lightly. Although our expertise is in the financial services industry, our ultimate reason for existence is to advance the Kingdom and support the mission of the Free Methodist Church.

Proverbs 15:22 reminds us, “Without counsel plans fail, but with many advisers they succeed.” The better each individual, family, local church, and conference stewards the resources God has entrusted to their care, the more we can accomplish together for Kingdom purposes.

How can we **partner** with you today?

Mark S. Olson
President & CEO



2023 Ministry Highlights



PLANNING

In 2023, we provided hope and peace to families through **107 financial planning engagements** and **234 estate planning engagements**. Kingdom-minded clients designated over **\$20 million** to be distributed to ministry in the coming years through revocable estate planning documents.

FM Financial's assets under management increased to **\$583 million** in 2023. This includes retirement accounts, non-retirement accounts, endowments, charitable trusts, pension accounts, managed accounts, charitable giving accounts, and more. We are now supporting **over 1800 households/organizations** with various investment accounts to help them fulfill their financial goals and remain disciplined in an ever changing financial world.



INVESTING



GIVING

Through our generous donors, in 2023, we distributed over **\$8 million** to various ministries. These gifts included **\$1.2 million** from existing endowments; **\$1.5 million** from gift maturities; **\$2 million** from outright gifts (cash, securities, real estate, qualified charitable distributions); and **\$3.3 million** from giving accounts.

In 2023, we helped empower FM churches and ministries for growth through loan disbursements totaling over **\$13.8 million**. We approved **13 new loans** and are now servicing **119 loan relationships**. All of this is made possible by Kingdom-minded investors in the Free Methodist Investment and Loan Fund.



LOAN FUND