

“The earth is the LORD’s, and everything
in it, the world, and all who live in it.”

PSALM 24:1



EMPOWERING BIBLICAL STEWARDSHIP

Financial
Planning
Ministry



GOD OWNS IT ALL.

“His master replied, ‘Well done, good and faithful servant! You have been faithful with a few things; I will put you in charge of many things. Come and share your master’s happiness!’”

MATTHEW 25:23

God asks us to be good and faithful stewards of the resources entrusted to us. Sharing that understanding with your church family and supporters of your ministry is as important for them individually as it is for Kingdom impact. Encouraging them to take practical steps to protect and share their assets will assist them in fulfilling God’s purpose for their lives and in the local church.

Financial Planning Ministry exists to fund ministry by educating families and facilitating generosity through planned giving.

Financial Planning Ministry (FPM) is a trusted name in estate planning and planned giving. Since 1982, more than 30,000 families and individuals have benefitted from our unique “stewardship through estate planning” ministry. And, our partners have benefitted as well with gift expectancies in the \$30–\$50 million range for long-term partners. The resources for all partners continue to grow every year.

“Financial Planning Ministry is a valued partner and a huge blessing to Calvary Chapel families. The FPM seminars provide accurate and practical information with a biblical foundation to assist them with the process of setting up their wills and trusts. FPM creates the necessary documents in a timely manner with great customer service. We are looking forward to continuing our partnership with FPM as they help our church families leave a legacy that will honor our God.”

Kirk Andresen
Stewardship Ministry,
Calvary Chapel
Fort Lauderdale, FL



**“A GOOD PERSON LEAVES AN INHERITANCE
FOR THEIR CHILDREN’S CHILDREN.”**

PROVERBS 13:22A

What is estate planning?

Estate planning is often overlooked as a means for good stewardship. But, regardless of financial position or age, every adult should have an effective estate plan that includes future distribution of resources, outlines important medical decisions, and provides for the guardianship of minor children.

FPM removes confusion about estate planning and provides stewardship opportunities to believers at any income level. Families are assisted with crucial estate planning documents without the typical cost of \$1,500 to \$4,000 incurred elsewhere. Those savings, along with assets saved from avoiding probate, can be redirected to ministries and family members.

Why is estate planning critical?

- It protects families and loved ones.
- It ensures wishes will be followed legally.
- It provides for guardianship of minor children.
- It plans for medical emergencies or incapacitation.
- It avoids the time and expense of probate.
- It is good stewardship.

Why avoid probate?

- It is expensive (6–8% of assets lost).
By avoiding probate, those funds can be redirected to be used in ministry efforts and to bless family members.
- It takes time (9 months to 2 years or more).
- It freezes assets (property can't be sold).
- It lacks privacy (documents become public record).



HOW MINISTRIES BENEFIT

What does a partnership
with FPM provide for
your ministry?

Comprehensive

A turnkey process for leaders who want to achieve their ministry's long-range vision.

Stewardship Education

A Christ-centered approach that encourages and empowers members to give from their estate assets, rather than just their current cash flow, achieving increased levels of generosity and stewardship.

Low maintenance

A proven program serving leaders with stewardship educational systems.

Assistance

Comprehensive services for the ministry and its members, including communication and promotional assistance, group seminars, one-on-one consultations, and the creation of revocable living trusts and wills (and other more complex tools if required).

Gift Reports

An ongoing long-term financial perspective providing ministries with readily available gift reports including active and developing estate plans, as well as actual gifts received from estate documents prepared through your stewardship ministry.

Effectiveness

FPM offers a unique approach with more than 30,000 plans currently in effect, representing more than \$1.4 billion in gift expectancies.

HOW MEMBERS BENEFIT

What does a partnership with FPM provide for families?

Choice

Members may name any church, charity or individual as a beneficiary of their estate.

Loyalty

We guide members through the entire process, from start to finish. They will never be “handed off.”

Reliability

Our dedicated consultants and highly-trained staff remove the doubt and confusion surrounding estate planning and charitable giving. We provide estate planning services your members and their families can rely on.

Privacy

Financial Planning Ministry is an independent third party service provider. Confidentiality is assured.

Security

Strategically safeguarding important legacy decisions is part of our ministry. We secure the firm foundation of love and charity that members have established for themselves and their families. Our purpose is to ensure their desires are met, creating peace of mind for both the present and the future.

Convenience

Estate plans may be reviewed by members at their convenience, and documents can be easily updated over time.

Service

We understand that each of our members is unique, and seek to provide quality service to meet every individual need. We greatly value our members’ faith in our work and the services we provide.

WHAT THE RESEARCH SAYS...

\$68 trillion

will change hands over next 25 years

– *cnbc.com*

57%

of U.S. adults do not currently have estate planning documents.

– *Caring.com*
2019

Two-thirds

of all adults have no living will or other advance directive.

– *americanbar.org*
October 2018

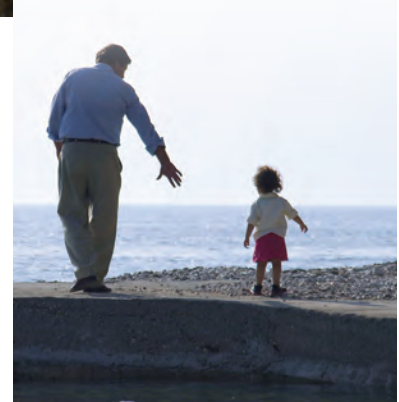




What is FPM's approach?

- FPM presents a series of estate planning seminars for the membership of its Partners each year. These seminars are scheduled and promoted by your ministry as part of your stewardship teaching.
- Members work directly with FPM consultants in personal, convenient, one-on-one appointments to establish their estate planning documents. There is no out-of-pocket cost to members.
- Members are encouraged to leave a percentage of their estate (5% or more) or a cash gift to one of FPM's Partners (your ministry).
- Members become a part of the FPM family for as long as desired, and can update or modify their estate plans when needed at no cost.
- FPM reports total expectancies to Partners without violating the financial privacy of members.
- Annual funding rates are established for Partners based on active gift expectancies.

Our professionals have diverse backgrounds in the fields of law, business, finance, theology, education, planned giving, and administration. We have experience assisting members with estate plans ranging in value from \$20,000 to more than \$20 million.



“Central Christian Church of Arizona has partnered with Financial Planning Ministry for twenty years and it has been a tremendous blessing to our people. FPM has been one of the most effective ministries we have been able to offer our people and they have consistently provided high quality service from a decidedly Christian perspective.”

Dave Briggs

Enrich Financial Ministry Director
Central Christian Church, Mesa, AZ

LET'S GET **STARTED!**

Attend a seminar near you

We would be glad to share our experiences and successes. You may want to attend one of our seminars to get a firsthand look at the education and information we provide.

Visit our office for an orientation session

We offer orientation sessions several times a year at our headquarters in Irvine, CA. These events provide an inside look at our processes and ministry operations. Ask us for more information about attending!

Speak with an estate consultant

Contact our office if you'd like to speak with one of our estate consultants, and learn more about a partnership with FPM. You can also visit our FAQ 'Frequently Asked Questions' page on our website for more answers.

We look forward to answering your questions and sharing how FPM can assist you with planned giving and stewardship efforts designed to bless your church family and ministry.



800-871-4901
www.fpm.org



Greetings!

We are excited to share the many benefits of a partnership with Financial Planning Ministry for both your church and the families you serve through ministry. For more than 35 years, FPM has removed confusion surrounding estate planning, and provided stewardship opportunities to believers at any income level. Today, over 30,000 families and individuals have benefitted from this unique “stewardship through estate planning” ministry. Through our innovative funding model, worthy ministries like yours receive much needed future gift income while assisting your families with crucial estate planning documents. We look forward to providing you with more details about the blessings an FPM partnership can bring to your ministry and members.



A handwritten signature in black ink that reads "Mike Prior". The signature is fluid and cursive.

Mike Prior, JD
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Financial
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A white logo consisting of four arrowheads pointing outwards from a central point, forming a cross-like shape.