

FPM PARTNERSHIP FACT SHEET

About Us

Established in 1982, Financial Planning Ministry was founded by five parachurch ministries looking to facilitate planned giving through properly executed estate plans. Now, FPM's partner list has grown to over 150 ministry partners nationwide, enabling them to provide more than 46,000 families with both education and legal documents. Additionally, over \$2.5 Billion have been committed to charitable giving through FPM estate plans.

Who We Are

FPM is a ministry, first and foremost. As a non-profit organization, our mission is to fund kingdom work by educating families about stewardship-focused estate planning, then facilitating their generosity through planned giving.

What We Provide

- **Dedicated Relationship Manager** to support and strategize with you
- **Educational Presentations** for your supporters
- **Event Planning Guidance** for you and your team
- **One-on-One Consulting** for those who request documents
- **Estate Plans** customized to both personal and charitable directives
- **Ongoing Member Support** from our live team and 24/7 online resources

What We Are Not

- **Fundraisers**

We facilitate future giving so our partnership model is long-term. We focus on generational wealth transfer and are not a funding source for your current budget or capital campaign. Most partners see estate gifts come in after 10-15 years.

- **Advisors**

We provide education to partners and families, empowering them to make informed decisions. We do not provide legal or financial advice.

- **Attorneys**

We intentionally maintain 501(c)(3) non-profit status, enabling us to work nationwide as a document preparation service.

- **Salespeople**

We provide estate planning education and documents. We do not sell advice, insurance, investments, or other products.

- **Free Estate Planners**

FPM's services are not free. Our [Ministry Partners](#) fund our turnkey services: educational presentations, document preparation, and ongoing maintenance. The individuals and families who participate then give back to our partners through estate gifts. This creates a cycle of charitable giving that covers our costs and funds your future kingdom work.

Contributions begin at \$24,000 annually (paid monthly, quarterly, or yearly). We revisit this figure as your fiscal year approaches and only increases it as gifts to your ministry increase (in estate plans confirmed signed).

Ultimately, providing estate plans to your members goes beyond providing planned giving resources alone. This partnership is an investment in trusting relationships – between FPM, you, and your members – from start to the ultimate finish.

What is the Next Step

- Reply to our email with your interest in continuing this conversation! Also, see our [Website](#) and [Partnership Brochure](#).