

Visiting here on:

## Dave Moffitt

Regional Representative



Helping you manage the resources entrusted to your care

### Financial Planning

Personal Financial Analysis  
Investment Strategy Assessment  
Retirement Planning

### Gift Planning

Gifts of Stock, Real Estate, and other Assets  
Charitable Remainder Unitrust  
Charitable Gift Annuity\*  
Endowment

### Estate Planning

Last Will and Testament  
Revocable Living Trust  
Power of Attorney

### Investment Management

Investment & Loan Fund\*  
Personalized Investment Management

\*available only in states where authorized

### Contact Dave without obligation:

phone: 800.325.8975 x854  
web: [www.FMFfinancial.org/dave](http://www.FMFfinancial.org/dave)  
email: [dmoffitt@fmfoundation.org](mailto:dmoffitt@fmfoundation.org)  
text/call: 517. 416.1626



For additional information about Dave and FMF Financial Services, scan this QR code.

*Stewardship*  
WELL DONE