CG SUPRT Personal Financial Wellness Education

Life-Cycle Series

The Life-Cycle Series is a collection of workshops. Each workshop correlates with a particular stage of a person's life and Coast Guard career.

Life-Cycle workshops are designed for active duty, reserve members, civilian employees and their families. Each workshop includes an accompanying workbook.

STAGE I: INTRODUCTION TO LIFE-LONG PERSONAL FINANCIAL HABITS (3 hours)

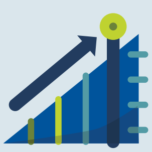
This workshop introduces ten personal financial habits of financially successful people. It addresses challenges typically encountered in the first five years of an individual's career.

- Understanding Your Income, Managing Your Spending, & Avoiding Big Mistakes
- Managing Debt & Keeping Good Credit
- Building a Foundation for Your Financial Future

STAGE II: PLANNING, PRIORITIZING, & PROTECTING YOUR FINANCES (2 hours)

This workshop addresses financial challenges typically encountered in the middle of one's career. These challenges may include circumstances like growing families, debt obligations, and career responsibilities.

- Balancing Life & Finances in the Middle of Your Career
- Building a Foundation for Career Advancement & Retirement



STAGE III: HOW TO PLAN FOR CAREER TRANSITIONS & RETIREMENT (2 hours)

This workshop addresses planning for retirement and/or transitioning into civilian life. Even if you got a late start planning your retirement or career transition, this workshop will help you get on track.

- Assessing Your Financial Wellness & Preparing for Career Transitions
- Defining & Sustaining Your Retirement Lifestyle

YOUR PERSONAL FINANCIAL WELLNESS PROGRAM

In between stages, individuals receive continued support to improve their finances by taking advantage of the CG SUPRT Financial Wellness program features, such as:

- Working with a personal Money Coach for FREE
- Timely webinars and on-site classes
- Access to hundreds of financial tips and articles

CG SUPRT Personal Financial Wellness Education

FAQ

What is the Personal Financial Wellness Program? The sole purpose of the CG SUPRT Personal Financial Wellness Program is to help individuals and their families overcome financial challenges they may be facing and to accomplish financial goals. Unlike other financial programs, this program provides customized solutions based on each individual's personal circumstances, and combines one-on-one coaching, website resources, and educational classes to help individuals and their families achieve financial peace of mind.

How do I order a class or Life-Cycle workshop?

- Command Personnel: Email *Class Request Form* to your Personal Financial Manager (PFM) for processing.
- Personal Financial Managers: Email *Class Request Form* to the Family Services Division at **HQS-SMB-FamilySupportServices@uscg.mil** for processing.

What is the lead time? The lead time necessary to schedule and deliver an educational event is 5 to 6 weeks.

What benefits are available after completing a class or Life-Cycle workshop? After completing an educational event, individuals have the opportunity to work one-on-one with their own personal and confidential Money Coach. For more information on what is included, see the program overview.

NEW IMPLEMENTATION RECOMMENDATIONS

Standard Financial Classes: Up to three classes can be ordered for a given location on the same day.

Life-Cycle Series: Up to two workshops can be offered at a given location on the same day.

If two different workshops (e.g. Life-Cycle Stage I and Stage II) are selected for the same day, please insure that the audience differs for each workshop. Otherwise, please revise your selection by replacing one of the Life-Cycle workshops with a standard financial class.

Each of the Life-Cycle workshops requires the following time frames:

Stage I: Three hours
Stage II: Two hours
Stage III: Two hours

MEMBERS SAY IT BEST

"Engaging, honest, blunt, helpful, life-changing for myself and entire family."