



# Personal Financial Management Program Fact Sheet



## Information and Resources

The Coast Guard's Personal Financial Management Program (PFMP) provides a collaborative and comprehensive approach to education and counseling, emphasizing a proactive career lifecycle approach to behavior change modification. COMDTINST 1740.8, Coast Guard PFMP - [http://www.uscg.mil/directives/ci/1000-1999/CI\\_1740\\_8.pdf](http://www.uscg.mil/directives/ci/1000-1999/CI_1740_8.pdf)

### Personal Financial Management Program

The Personal Financial Management Program (PFMP) consists of the following 7 elements:

**1) Education and Training.**

Education and training is designed as a continuum of service consisting of training throughout the military life cycle.

**2) Counseling.**

One-on-one assistance is provided by certified financial professionals.

**3) Information and Referral.**

Information and referral is provided by Command Financial Specialists and designated specialists on a range of financial topics.

**4) Command Financial Specialist (CFS) Program.**

The CFS functions as the command/unit's principal advisor on policies and matters related to Personal Financial Management (PFM).

**5) Outreach.**

PFM information will be published regularly and family members are encouraged to participate in PFM services.

**6) Collaboration and Coordination.**

Commands should first seek PFMP services from CG sponsored financial readiness assets. When non-governmental organizations are utilized, they should comply with policy.

**7) CG SUPRT Financial Wellness Program.**

Provides financial classes, webinars and confidential financial counseling (money coach) services.

### Education and Training

A wide range of training opportunities are offered through the Personal Financial Management Program.

**1) CFS Training.**

A week long training certifying the participant with a CFS competency.

**2) Financial Wellness and Military Life Cycle Training.**

Various individual topics are offered, as well as the Life Cycle Series specific to a stage in a persons life and career.

**3) Webinars.**

Financial Wellness Webinars are offered twice monthly.

### Counseling

**1) Money Coach.**

a. A money coach assists, advises and teaches good financial habits through a one-on-one confidential and unbiased coaching relationship.

b. Contact CG SUPRT at 1-855-CG SUPRT (247-8778) or [www.CGSUPRT.com](http://www.CGSUPRT.com) and click "Personal Financial Management" to schedule one-on-one Money Coaching.

**2) Personal Financial Manager (PFM).**

PFM staff are trained to provide financial counseling and to assist with your financial educational needs. They can be found on most DoD installations.

### Information and Referral

**1) Command Financial Specialist**

**2) Office of Work Life - PFMP Coordinator**

<http://www.uscg.mil/worklife/contact.asp>

**3) Office of Work Life - PFMP Website**

[www.uscg.mil/worklife/financial.asp](http://www.uscg.mil/worklife/financial.asp)

**4) CG SUPRT - Personal Financial Management**

[www.CGSUPRT.com](http://www.CGSUPRT.com) or 1-855-CG SUPRT (247-8778)

### Additional PFMP Resources.

For policy related information, please contact the HQ Personal Financial Management Program Manager at [HQS-SMB-FamilySupportServices@uscg.mil](mailto:HQS-SMB-FamilySupportServices@uscg.mil) or 202-475-5159.

