



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

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 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

4) CG SUPRT - Personal Financial Management

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 or 202-475-5159.

