

Personal Financial Management Program (PFMP)

The Personal Financial Management Program (PFMP) seeks to provide access to resources, training, and counseling necessary to develop strategies to empower USCG members and their families to meet personal financial goals, achieve financial security, and to remain mission ready.



District 17 PFM

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Additional Coast Guard PFM Staff

To contact the PFM Staff closest to you, call 1-202-475-5100 followed by the extension for the selected location:

- Base Alameda / D11 (6)**
- Base Boston / D1 (1)**
- Cape May / D5 (2; press 1)**
- Base Cleveland / D9 (5)**
- Base Honolulu / D14 (8)**
- Base Kodiak / D17 (9)**
- Base Miami / D7 (3)**
- Base New Orleans / D8 (4; press 1)**
- Sector Houston / D8 (4; press 2)**
- Base Portsmouth / D5 (2; press 3)**
- Base LA Long Beach / D11 (6)**
- Base Seattle / D13 (7)**
- Base NCR / D5 (2; press 2)**

***Plan and Budget,
Eliminate Debt,
Save and Invest***

Personal Financial Management Program

***Financial Counseling,
Training, and
Resources for
USCG Members
and Families***





Personal Financial Management Program (PFMP)

The program consists of multiple avenues in meeting Coast Guard member's financial counseling and education needs. Whether a Coast Guard member is stationed in a remote area, or located at District Headquarters, the PFMP has resources to reach Coast Guard members wherever they may be stationed or deployed, and at any point in their career.

The PFMP uses the expertise of Command Financial Specialists, Personal Financial Managers, and CG SUPRT to deliver a robust education and training program, information referrals, and financial counseling.



Command Financial Specialist (CFS)

The Command Financial Specialist (CFS) is the unit's point of contact on policies and matters pertaining to Personal Financial Management Program (PFMP).

A designated CFS or Assistant CFS has successfully completed the US Navy Command Financial Specialist Training Course. Once formally designated in writing by the command, the CFS is authorized to provide the following financial services:

- Provide basic financial services to include spend plans, rapid debt repayment plans using the Financial Planning Worksheet, and a free FICO credit score.
- Disseminate approved financial resource information and referrals.
- Conduct unit training and workshops on various financial topics, including debt management, spending plans, Investing basics, wise use of credit, and more.

Personal Financial Manager (PFM)

The Personal Financial Manager (PFM) is the Coast Guard's financial counselor for each District's Personal Financial Management Program.

PFMs are Accredited Financial Counselors® and the designated subject matter experts in all areas of personal finances. Areas that are normally addressed with the PFMs include:

- Goal Setting and Spending Plans
- Service Member Civil Relief Act Questions
- Transitional and Security Clearance Challenges
- Debt Reduction and Credit Management Strategies
- Home and Car Buying Strategies
- Thrift Saving Plan (TSP) Questions
- Retirement and Estate Planning Strategies

CG SUPRT Personal Financial Wellness

The CG SUPRT Personal Financial Wellness Program provides onsite classes, webinars, and money coaching for USCG members, civilians, select reservists, and their family members. There are times and advantages to use CG SUPRT because of their distance learning and distance counseling platforms. Additionally, their on-site financial classes help support the District PFM's financial training.

A variety of financial classes are offered by CG SUPRT's webinars. Free tax filing with H & R Block is also available through CG SUPRT's website. Money coaching sessions are held over the telephone and use a holistic approach in financial counseling covering goal setting, budget planning, debt management, investment and retirement planning, and estate planning.

www.cgsuprt.com

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