

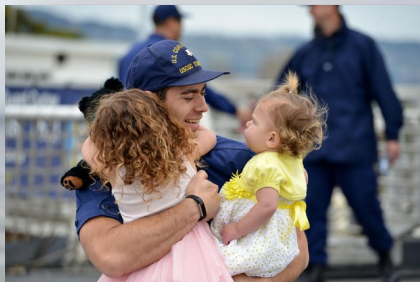
## ***Personal Financial Management Program (PFMP)***

### ***Mission:***

***Financial Readiness equals Mission Readiness***

### ***Vision:***

***The Personal Financial Management Program (PFMP) provides access to financial resources, education and training, and counseling necessary to empower USCG personnel and their family members to meet personal financial goals, achieve financial security, and to remain mission ready.***



## **PFM Points of Contact**

***To contact the PFM Staff closest to you, call 1-800-872-4957 followed by the extension for the selected location:***

*Alameda (252)  
Boston (301)  
Cleveland (309)  
Honolulu (314)  
Ketchikan (317)  
Kodiak (563)  
Miami (307)  
New Orleans (308)  
Portsmouth (305)  
San Pedro (311)  
Seattle (313)  
St. Louis (302)  
Washington, DC (932 )*

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



# ***Personal Financial Management Program***

***Financial Counseling,  
Training, and  
Resources for  
USCG Personnel  
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](http://www.cgsuprt.com)

855-247-8778

