

Command Financial Specialist Training

PERSONAL FINANCIAL MANAGEMENT PROGRAM



“Improving Your Personal Financial Vision”

The Command Financial Specialist (CFS) shall function as the Command’s principal advisor on policies and matters related to Personal Financial Management. Following qualifications apply:

- Minimum pay grade will be E6 for enlisted; Minimum for officers WO/01 (“Waivers” may be granted on a case-by-case basis).
- Highly motivated and financially stable.
- Demonstrated competency in public speaking/facilitator forums.
- Be designated, in writing by the Commanding Officer as outlined in OPNAVINST 1740 series.
- Successfully complete the CFS training course provided by an authorized Marine & Family Services Financial Specialist using CFS Training Courseware developed by Commander, Navy Installations (CNI) (N21) and Naval Education and Training Command (NETC).
- Have at least one-year remaining onboard present command.
- Participate in continuing education including, but not limited to, periodic CFS forums and CFS refresher training at least every three years.
- Certificate awarded upon completion.



PLEASE SEE BACK

**CLASS SESSIONS ARE LISTED BELOW OVER AN 8-WEEK PERIOD (0800-1200). ALL CLASSES ARE MANDATORY FOR CFS CANDIDATES. OTHER INTERESTED PERSONNEL MAY ATTEND THE CLASSES OF YOUR CHOICE.
*(SPOUSES ARE HIGHLY ENCOURAGED TO ATTEND)***

****SESSION 1: 10 September 2009, Family Team Building & Community Services, Building #1795**

Welcome and Administration *(Williams/Middleton)*

Introduction to Command Financial Specialist Training *(Middleton)*

Introduction to Financial Counseling *(Williams)*

Introduction to Spending Plan Worksheet *(Middleton)*

Military Pay Issues *(Disbursing)*

Student Assignment TBA *(Williams/Middleton)*

****SESSION 2: 17 September 2009, Family Team Building & Community Services, Building #1795**

Understanding Financial Behavior (General) *(Williams)*

Examining Your Financial Behavior (Couples) *(Middleton)*

Legal Issues & Finance (Marriage, Divorce, Alimony, Child Support, Bankruptcy) *(Base Attorney)*

Impact of Finance on Counseling Services (CS) *(Derring)*

****SESSION 3: 24 September 2009, Family Team Building & Community Services, Building #1795**

Banking & Finance *(PCMU Management)*

Car Buying Strategies *(Gleisberg)*

****SESSION 4: 1 October 2009, Family Team Building & Community Services, Building #1795**

Debt/Credit Management (Debit/Credit Cards, Credit Report, FICO Score, Scams) *(Middleton)*

Better Business Bureau/Ethical Business Practices *(Terry)*

The Educated Consumer/Identity Theft *(Terry)*

****SESSION 5: 8 October 2009, Family Team Building & Community Services, Building #1795**

Navy Marine Corps Relief Society *(Middleton)*

Life Cycle Management of Insurance *(Hughes)*

****SESSION 6: 15 October 2009, Family Team Building & Community Services, Building #1795**

Economics & Financial Literacy: The Language of the Stock Market *(Williams)*

Wealth Building Concepts I & II *(McIsaac)*

(Savings, Investing, Mutual Funds, Stocks, IRAs, 401(k), TSP, CSB/REDUX, Retirement Planning)

****SESSION 7: 22 October 2009, Family Team Building & Community Services, Building #1795**

Home Buying Strategies *(Andrea/Rosie)*

U. S. Monetary Economic Outlook *(Williams)*

****SESSION 8: 29 October 2009, Family Team Building & Community Services, Building #1795**

Information and Referral *(Darnell)*

American Red Cross/WIC *(ARC/WIC Representative)*

Marine Corps Family Team Building Overview *(FTB Representative)*

Post Test/Program Evaluation *(Williams/Middleton)*

Presentation of Certificates *(Williams/Middleton)*

Financial and Consumer Education are the focus of the Personal Financial Management Program. Services include workshops ranging from Basic Financial Management Tools to more sophisticated Financial Planning, Financial Crisis Counseling, and Personal Budget assistance. For more information or to register, please see the MCCS Website: www.mccsp.com and click on the Financial Link or call Marine & Family Services at (760) 725-9790 (Building 13150). located in Building 13150 (Mainside).

