Approved PFC Presentations

Before You Take Off: Financial Planning for Deployment

This presentation provides information relevant to service and family members preparing for deployment. Topics include important documents, family care plans, Servicemembers Civil Relief Act (SCRA), the Savings Deposit Program and the Thrift Savings Plan (TSP). It also includes a guide to making arrangements for financial matters such as paying bills, taxes, property management, etc.

Developing Your Spending Plan

This presentation emphasizes the need for establishing a financial plan and introduces components of a spending plan and the Financial Planning Worksheet. It presents tips to manage spending, suggestions for an "ideal" spending breakdown and SMART goals to assist in establishing financial priorities.

Dream Big Plan Now: Making Your Ideal Retirement a Reality

This presentation is an active duty-focused approach to retirement planning. Topics include sources of income, steps to planning retirement and the Thrift Savings Plan (TSP). It introduces and compares the Final pay, High-36 and CSB/Redux military retirement plans, as well as the Blended Retirement System (BRS).

Life after Deployment

This presentation provides information to assist service members in making decisions regarding money earned while deployed. Topics include Savings Deposit Program withdrawal procedures and planning for changes in income upon return. Resources and financial planning processes are also provided during this presentation.

Saving and Investing: Simple Tips to Secure a Strong Financial Future

This presentation distinguishes between saving and investing approaches and identifies saving and investing options available to service members. Included in the presentation is a list of resources to assist with saving and investing activities.

Financial Jeopardy: Saving & Investing

This interactive "game" engages the audience in a Q&A session related to what they know about saving and investing.

Take Control of Your Finances: Managing Credit and Debt

This presentation provides information on credit establishment, credit management and debt relief. It introduces debt-to-income ratio concepts, the importance of monitoring credit reports and scores and briefly addresses the Servicemembers Civil Relief Act (SCRA) and bankruptcy.

Financial Jeopardy: Credit & Debt Management

This interactive "game" engages the audience in a Q&A session related to what they know about credit and debt management.

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Stretching Your Money

This presentation provides tips on living frugally through tracking expenses and developing a spending plan.

You Earned It: Making the Most of Your Military Benefits

This presentation covers pay, allowances, benefits, entitlements and available benefit resources. While geared toward active duty service members, this presentation is also appropriate for Guard/Reserve who have been activated under Title 10.

Home Sweet Home: Strategies for Home Buying

This presentation provides an overview of the home buying and the mortgage process. Topics include deciding to buy or rent, determining how much the purchaser can afford, realtors, preparations for purchasing and homeowners insurance. The presentation also covers elements of the Servicemembers Civil Relief Act (SCRA) and alternatives to foreclosure.

Thrift Savings Plan (TSP)

This presentation provides an overview of the Thrift Savings Plan (TSP). Topics include enrollment, participation, contributions, investments funds and withdrawal options. It also discusses the Roth TSP.

Tax Preparation

This presentation discusses the U.S. Tax system and the goals of tax planning. It covers information on who should file taxes, how to file taxes and introduces tax publications specific to service members. It also provides information on various tax services available to help service members prepare their taxes.

Financial Jeopardy: Taxes

This interactive "game" engages the audience in a Q&A session related to what they know about taxes.

PFC Services Overview

This presentation provides a concise overview of the PFC services provided under the Personal Financial Counseling program. (10-15 minutes)

Blended Retirement System (BRS):

http://militarypay.defense.gov/BlendedRetirement/

Available presentations include:

- Introduction to the BRS
- BRS Opt-In Course – Two-hour government-mandated training

NOTE: All presentations are designed to present in approximately 45 minutes, except for the PFC Overview and the BRS Opt-In as indicated above. With the exception of the BRS Opt-In training, each presentation can be tailored to accommodate a shorter briefing window as needed.