



COMMAND FINANCIAL SPECIALIST
NEEDS ASSESSMENT



This command is in the process of developing a Financial Education program for all personnel. This survey is to determine the types of services you would like to have provided at this command to facilitate managing your personal financial affairs.

Education– Please rank the following subjects from 1 to 10 with 1 being the area you are most interested in having training provided.

- _____ Establishing a Spending Plan/Budget
- _____ Credit Management
- _____ Savings and Investments
- _____ Thrift Savings Plan
- _____ Retirement-Redux with Bonus
- _____ Checking Accounts
- _____ Car Buying
- _____ Life Insurance
- _____ Home Buying
- _____ Money Management for Couples
- _____ Money Management for Singles
- _____ Others

Information– Would you find it helpful to have the following provided?

- | Yes | No | |
|-------|-------|---------------------------------------------------------------------------------------|
| _____ | _____ | Regular Plan-of-the-Day notes with tips on personal financial management. |
| _____ | _____ | Information rack with personal financial management brochures and booklets available. |
| _____ | _____ | Personal Financial Management Bulletin Board. |
| _____ | _____ | Financial management articles in the command's and spouse club's newsletters. |

Consultation– Would you find it useful to have the following available?

- | Yes | No | |
|-------|-------|--------------------------------------------------------------------------------------------------------|
| _____ | _____ | Financial counseling service provided by a Command Financial Specialist. |
| _____ | _____ | A Command Financial Specialist to consult with prior to making major purchases or financial decisions. |

Please list other services that you would find useful in managing your personal finances and any comments.

Please Return This Form To:

Thank you.