

CHANGE SHEET 1

1. Synopsis. This change sheet corrects minor administrative errors in the L229, Financial Management Training Support Package.

2. Pen and ink changes: none.

3. Page change(s): Remove old pages and insert revised page(s) as indicated.

Remove Pages Insert Pages

1 thru 8

1 thru 8

4. Additional changes that need explaining: none.

5. File this sheet in front of the TSP for reference purposes.

6. Approval of change sheet.

Name/Signature	Rank	Position	Date
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TRAINING SUPPORT PACKAGE (TSP)

TSP Number / Title	L229 / FINANCIAL MANAGEMENT
Effective Date	20 OCT 2003
Supersedes TSP(s) / Lesson(s)	L229, Financial Management, Oct 02.
TSP Users	600-PLDC, Primary Leadership Development Course 600-PLDC (MOD), Primary Leadership Development Course (Modified)
Proponent	The proponent for this document is the Sergeants Major Academy.
Improvement Comments	<p>Users are invited to send comments and suggested improvements on DA Form 2028, <i>Recommended Changes to Publications and Blank Forms</i>. Completed forms, or equivalent response, will be mailed or attached to electronic e-mail and transmitted to:</p> <p style="text-align: center;">COMDT USASMA ATTN ATSS DCP BLDG 11291 BIGGS FIELD FT BLISS TX 79918-8002</p> <p style="text-align: center;">Telephone (Comm) (915) 568-8875 Telephone (DSN) 978-8875</p> <p style="text-align: center;">E-mail: atss-dcd@bliss.army.mil</p>
Security Clearance / Access	Unclassified
Foreign Disclosure Restrictions	FD5. This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.

PREFACE

Purpose

This Training Support Package provides the instructor with a standardized lesson plan for presenting instruction for:

Task Number**Task Title**

121-008-1496

Supervise the Implementation of Financial Readiness
Actions

This TSP
Contains

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**FINANCIAL MANAGEMENT
L229 / Version 1
20 OCT 2003**

SECTION I. ADMINISTRATIVE DATA

All Courses Including This Lesson	<u>Course Number</u>	<u>Version</u>	<u>Course Title</u>	
	600-PLDC	1	Primary Leadership Development Course	
	600-PLDC MOD	1	Primary Leadership Development Course (Modified)	
Task(s) Taught(*) or Supported	<u>Task Number</u>	<u>Task Title</u>		
		<u>INDIVIDUAL</u>		
	121-008-1496 (*)	Supervise the Implementation of Financial Readiness Actions		
Reinforced Task(s)	<u>Task Number</u>	<u>Task Title</u>		
Academic Hours	The academic hours required to teach this lesson are as follows:			
		<u>Resident Hours/Methods</u>		
		2 hrs	/ Conference / Discussion	
	Test	0 hrs		
	Test Review	0 hrs		
	Total Hours:	2 hrs		
Test Lesson Number		<u>Hours</u>	<u>Lesson No.</u>	
	Testing (to include test review)	_____	N/A	
Prerequisite Lesson(s)	<u>Lesson Number</u>	<u>Lesson Title</u>		
	None			
Clearance Access	Security Level: Unclassified Requirements: There are no clearance or access requirements for the lesson.			
Foreign Disclosure Restrictions	FD5. This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.			
References	<u>Number</u>	<u>Title</u>	<u>Date</u>	<u>Additional Information</u>
	AR 608-1	ARMY COMMUNITY SERVICE CENTER	20 Oct 2003	L229
	TC 21-7	PERSONAL FINANCIAL READINESS AND DEPLOYABILITY HANDBOOK	14 Oct 1994	L229

Student Study Assignments

Before class--

- Read SH-1, Extracts from TC 21-7, SH-2, Extracts from AR 608-1, and SH-3, Advance Sheet.

During class--

- Participate in classroom discussions
- Complete PE-1.

After class--

- Turn in recoverable reference materials.
-

Instructor Requirements

1:8, SSG PLDC graduate, ITC, and SGITC qualified

Additional Support Personnel Requirements

<u>Name</u>	<u>Stu Ratio</u>	<u>Qty</u>	<u>Man Hours</u>
None			

Equipment Required for Instruction

<u>ID Name</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt</u>	<u>Qty</u>	<u>Exp</u>
6730-00-577-4813 SCREEN, PROJECTION	1:16	1:2	No	1	No
6730-00-P53-8147 Projector, Overhead	1:16	1:2	No	1	No
7110-00-132-6651 CHALKBOARD	1:16	1:2	No	1	Yes
7520-01-424-4867 EASEL, DISPLAY AND TRAINING	1:16	1:2	No	1	Yes
7530-00-619-8880 PAD, WRITING PAPER	1:16	1:2	No	1	Yes

* Before Id indicates a TADSS

Materials Required**Instructor Materials:**

- TSP.
- VGTs: 1 thru VGT-13.

Student Materials:

- SH-1, Advance Sheet.
- SH-2, U.S. Army Personal Financial Management Training Instructor Guide, 2002.
- SH-3, Personal Financial Management.
- SH-4, Split Disbursement Payment Option for DOD Traveler.
- SH-5, DOD Financial Management Regulation, Vol 9, Chap 3.
- Any materials required by the NCOA's SOP.
- Pen or pencil and writing paper.

NOTE: Issue handouts to students during in processing.

**Classroom,
Training Area,
and Range
Requirements**

CLASSROOM (40X40 PER 16 STUDENTS)

**Ammunition
Requirements**

<u>Id</u>	<u>Name</u>	<u>Exp</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt Qty</u>
None					

**Proponent
Lesson Plan
Approvals**

<u>Name</u>	<u>Rank</u>	<u>Position</u>	<u>Date</u>
/s/Randolph E. Kelly			
/t/Kelly, Randolph E.	GS09	Training Specialist	24 Jul 03
/s/Frank W. Berta			
/t/Berta, Frank W.	GS09	Course Chief, PLDC	24 Jul 03
/s/Brian H. Lawson			
/t/Lawson, Brian H.	SGM	Chief, NCOES	24 Jul 03
/s/John W. Mayo			
/t/Mays, Albert J.	SGM	Chief, CDDD	24 Jul 03

SECTION II. INTRODUCTION

Method of Instruction: Conference / Discussion
 Technique of Delivery: Small Group Instruction (SGI)
 Instructor to Student Ratio is: 1:8
 Time of Instruction: 5 mins
 Media: None

Motivator

As a soldier, you must know and understand the key aspects of financial management. Money management is a factor of everyday life. No one is born with the ability to manage money wisely; it is a learned skill.

You need to be able to identify the importance of wise decision making when it comes to money management and assist your soldiers to ensure they have the information available to make their own wise money management decisions.

Terminal Learning Objective

NOTE: Inform the students of the following Terminal Learning Objective requirements. At the completion of this lesson, you [the student] will:

Action:	Recognize the importance of managing personal finances.
Conditions:	In a classroom or field environment, and given a squad and Student Handouts 1 thru 6.
Standards:	Recognized the importance of managing personal finances by-- <ul style="list-style-type: none"> • Identifying ways to promote good financial management. • Identifying ways to choose and maintain good credit. • Identifying some investment options. • Identifying sources of financial assistance. IAW Student Handouts 1 thru 6.

Safety Requirements

None

Risk Assessment Level

Low

Environmental Considerations

NOTE: It is the responsibility of all soldiers and DA civilians to protect the environment from damage.

None

Evaluation

You will take a written examination. The examination will contain questions from this lesson. You must correctly answer 70 percent or more of the questions on the examination to receive a GO. Failure to achieve a GO on the examination will result in a retest. Failure of the retest could result in your dismissal from the course.

NOTE: Inform the students of where their examination will take place as posted on the training schedule and when they will receive feedback on the test. Include any retest information.

Instructional Lead-In

In basic combat training you received training on sure pay, the leave and earning statement, and how to maintain a personal checking account. In advanced individual training you received a refresher class that covered the three major elements of managing personal finances: spending less than you make, saving for the future, and getting financial help when you need it. During this period of instruction we will determine the importance of wise decision making when it comes to your managing finances. This lesson will identify some means of financial responsibilities, the wise use of credit, and different types of investments available to you when required, and who you can turn to for emergency assistance.

As a warrior leader you owe it to yourself to be financial stable and ensure that your soldiers are too. Financial security is extremely important to everyone. Financial problems affect warrior ethos when soldiers worry over finances and family problems caused by financial woes. Soldiers cannot place their undivided attention into the mission. When called upon to fight, soldiers need to deploy knowing that their finances and families are secure, so the soldier can concentrate on the deployment so as to engage and destroy the enemy.
