FPA Volunteer _____ Date _____

Note: Per military regulations we are not allowed to write down (on this form) any information that could be viewed as Personally Identifiable Information. Working within that frame work, we are able to ask for the following information, which will be used by the Personal Financial Management (PFM) specialist to provide follow on training at the unit level, if required.

On the LETTER OF ENGAGEMENT (LOE) FOR FPA PRO BONO FINANCIAL PLANNING SERVICES, you can write their first name(s) and make notes about what you discussed. At the end of your 30 minute consultation you will give them the LOE for their use.

At the end of the consultation (1) in the column Reason for Attending write the key reason(s) they attended; (2) circle whether or not you suggested they see the PFM, and (3) note the length of time you spent with them.

Financial Planning Day

Rank	Unit	Reason for Attending
		PFM referral Yes No Length of meeting _____
		PFM referral Yes No Length of meeting _____
		PFM referral Yes No Length of meeting _____
		PFM referral Yes No Length of meeting _____
		PFM referral Yes No Length of meeting _____
		PFM referral Yes No Length of meeting _____