



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
US ARMY INSTALLATION MANAGEMENT COMMAND
2405 GUN SHED ROAD
FORT SAM HOUSTON, TEXAS 78234-1223

Family and Morale, Welfare and Recreation Programs

20 SEP 2012

Ms. Vickie C. Mauldin
First Command Educational Foundation
1 FirstComm Plaza
Fort Worth, Texas 76109-4999

Dear Ms. Mauldin,

Thank you for your letter expressing First Command Educational Foundation's interest in supporting Soldiers and Families with financial educational programs.

I am responding to inform you that the Installation Management Command is not the correct recipient for your request and we have forwarded it to the correct proponent (Deputy Assistant Secretary of the Army for Civilian Personnel and Quality of Life).

While there may be some military Services and specific installation commanders who see a need for assistance, the Army primarily relies on its team of professional accredited financial counselors and educators located at Army Community Service centers world-wide to provide financial readiness training. We are indeed fortunate to also have a second set of resources available through the Army Emergency Relief and the Department of Defense chartered banks and credit unions.

As you noted in your letter, even when an organization is approved, the only way training can be provided is through the specific invitation of the installation commanding officer concerned, and only after he or she has exhausted all other sources.

As you can see, we are indeed well supported. However, we value your interest and efforts in supporting our Soldiers and their Families.

Sincerely,


J.C. Abney
Director, Family and Morale, Welfare and
Recreation Programs

Enclosure

Approval Process and Guidance to Provide Personal Financial Education to the U.S. Army

In accordance with Department of Defense Instruction (DoDI) 1344.07, *Personal Commercial Solicitation on DoD Installations*, paragraph 6.7.6.3, “educators from non-government, non-commercial organizations expert in personal financial affairs and their materials may, with appropriate disclaimers, provide the educational programs and information required by this Instruction if approved by a Presidentially-appointed, Senate-confirmed civilian official of the Military Department concerned.”

For the U.S. Army, the “Presidentially-appointed, Senate-confirmed civilian official” is the Deputy Assistant Secretary of the Army for Civilian Personnel and Quality of Life. Send letter of request to that office at the following address:

Deputy Assistant Secretary of the Army
(Civilian Personnel/Quality of Life)
Room 2D484
111 Army Pentagon
Washington, DC 20310-0111

Please note there are a number of requirements and limitations under DoDI 1344.07:

First Command Educational Foundation (501(c)(3)) could if they are approved by a Presidentially-appointed, Senate-confirmed Civilian (ASA(M&RA)) under paragraph 6.7.6.3 of the DoDI. Below are some excerpts from the policy:

6.7.6.1. Under no circumstances shall commercial agents, including employees or representatives of commercial loan, finance, insurance, or investment companies, be used.

6.7.6.2. The limitation in subparagraph 6.7.6.1. does not apply to educational programs and information regarding the Survivor Benefits Program and other government benefits provided by tax-exempt organizations under section (c) of 26 U.S.C. 501 (Reference (s)) or by any organization providing such a benefit under a contract with the Government.

6.7.6.3. Educators from non-government, non-commercial organizations expert in personal financial affairs and their materials may, with appropriate disclaimers, provide the educational programs and information required by

this Instruction if approved by a Presidentially-appointed, Senate-confirmed civilian official of the Military Department concerned. Presentations by approved organizations shall be conducted only at the express request of the installation commander. The following criteria shall be used when considering whether to permit a non-government, non-commercial organization to present an educational program or provide materials on personal financial affairs:

6.7.6.3.1. The organization must qualify as a tax-exempt organization under section (c)(3) or 1(c)(23) of Reference (s)).

6.7.6.3.2. If the organization has any affiliation with a company that sells or markets insurance or other financial products, the approval authority shall consider that company's history of complying with this Instruction.

6.7.6.3.3. All prospective educators must use appropriate disclaimers, in their presentations and on their other educational materials, which clearly indicate that they and the Department of Defense do not endorse or favor any commercial supplier, product, or service or promote the services of a specific financial institution.