



**SUPPLEMENTAL
INSTRUCTIONS FOR APPLICATION FOR APPROVAL AS A PROVIDER
OF A PERSONAL FINANCIAL MANAGEMENT INSTRUCTIONAL COURSE
FOR ACCREDITED UNIVERSITIES AND COMMUNITY COLLEGES**

Introduction. The United States Trustee Program has determined that accredited universities and community colleges are eligible to apply to become providers of personal financial management instructional courses using a streamlined version of the Application for Approval as a Provider of a Personal Financial Management Instructional Course (the “Application”).

Instructions. Accredited universities and community colleges should obtain a copy of the: (1) Application; and (2) Instructions for Application for Approval as a Provider of a Personal Financial Management Instructional Course from the United States Trustee’s website located at www.usdoj.gov/ust.

New Applicants. Check the box marked “New Applicant” in item 1.1. Complete every item in the Application and Appendices A through D. Do not check any of the “NC” (No Change) boxes. Where an item provides alternatives for new applicants and returning applicants, respond as directed for new applicants only.

Returning Applicants. Check the box marked “Returning Applicant” in item 1.1. Where an item provides alternatives for new applicants and returning applicants, respond as directed for returning applicants only.

Statement of No Change for Returning Applicants. Where a “NC” box appears beside an item, if the Provider’s response to that item is identical to its response in the most recent application, the Provider may check the “NC” box indicating no changes have occurred and continue to the next item. If an item does not offer the option of checking a “NC” box, then the Provider must complete the item even if its response has not changed since the previous application.

Five Year Requirement for Returning Applicants to Complete Application in Full. Every five years, returning applicants will be required to complete the application in full, whether or not there are any changes in their responses. Where an “NC” box appears beside an item, the Provider shall check the “NC” box indicating no changes have occurred if the Provider’s response to that item is identical to its response in the most recent application, but the Provider must also answer that question in full. Beginning in January 2023, Providers will be informed one year in advance that they will complete the following year’s application in full.

Notwithstanding the directions contained in the Instructions, accredited universities and community colleges must complete only the following portions of the Application:

Section 1. General Information Concerning the Provider

Complete all of section 1.

Section 4. Learning Materials and Methodologies (Course Curriculum)

Complete “Teaching Methods” and Sections: 4.2 - 4.9.

Section 5. Fees and Fee Waivers

Complete all of section 5.

Section 6. Disclosures

Complete all of section 6.

Section 7. Appendices.

Complete all of section 7.

Section 8. Certification and Signature

Execute Application as set forth in section 8.

Completed applications should be submitted to the Executive Office for United States Trustees in accordance with the Instructions for the Application. For questions regarding submission of an application pursuant to these Supplemental Instructions, please call (202) 514-4100.