

HUBBARD COMMUNICATIONS OFFICE
Saint Hill Manor, East Grinstead, Sussex

HCO POLICY LETTER OF 28 SEPTEMBER 1979
ISSUE VI

Remimeo
All Senior
Execs
All FP Members
All Div Heads
All Hatting
Officers

FINANCIAL PLANNING MEMBER HAT
CHECKSHEET

(Replaces FDD 27-1 DIV III INT
FINANCIAL PLANNING MEMBER HAT
CHECKSHEET, as this is updated
to include new financial poli-
cies.)

NAME: _____ ORG: _____
POST: _____ DIVISION: _____
DATE STARTED: _____ DATE COMPLETED: _____

PURPOSE: The purpose of this checksheet is to fully hat the FP Members on how to do a correct FP.

If not fast flow then starrates and an exam are required.
Starrates are done on all starred items.

PREREQUISITES: HCO PL 28 Sep 79 VII, FP MEMBER MINI-HAT CHECKSHEET.

CERT: FULLY HATTED FINANCIAL PLANNING MEMBER.

LENGTH OF COURSE: Two weeks part-time.

I. INTRODUCTION:

- | | | | | | |
|----|-------------------|-------------------------|--|--|--|
| 1. | HCO PL 7 Feb 65 | KEEPING SCIENTOLOGY | | | |
| | Reiss. 15.6.70 | WORKING | | | |
| 2. | HCO PL 17 Jun 70R | TECHNICAL DEGRADES | | | |
| | Rev. 9.4.77 | | | | |
| 3. | HCO PL 16 Nov 73 | STUDY TECH AND POST | | | |
| 4. | HCO PL 14 Feb 65 | SAFEGUARDING TECHNOLOGY | | | |
| | Reiss. 7.6.67 | | | | |
| 5. | | | | | |
| 6. | | | | | |
| 7. | | | | | |

II. KEY WORDS:

Fully word clear the following words in the Scientology Admin Dictionary and a good English dictionary.

MONEY	_____	_____	_____	CREDIT	_____	_____	_____
CASH	_____	_____	_____	DEBIT	_____	_____	_____
CREDITOR	_____	_____	_____	PURCHASE	_____	_____	_____
FEATOR	_____	_____	_____	SIGNATORY	_____	_____	_____
MANAGEMENT	_____	_____	_____	TREASURY	_____	_____	_____
CHEQUE	_____	_____	_____	DISBURSEMENT	_____	_____	_____
EXCHANGE	_____	_____	_____	ALLOCATION	_____	_____	_____
PRODUCT	_____	_____	_____	SOLVENCY	_____	_____	_____
DELIVERY	_____	_____	_____	ASSETS	_____	_____	_____
VALUABLE	_____	_____	_____	RESERVES	_____	_____	_____
FINAL	_____	_____	_____	STATEMENT	_____	_____	_____
PLAN	_____	_____	_____	REFUND	_____	_____	_____
PLANNING	_____	_____	_____	REPAYMENT	_____	_____	_____
GROSS INCOME	_____	_____	_____	OUTGO	_____	_____	_____
SOURCES	_____	_____	_____	BILLS	_____	_____	_____
FINANCE	_____	_____	_____	DATELINE	_____	_____	_____
ACCOUNT	_____	_____	_____	PROMOTION	_____	_____	_____

III. MONEY AND FINANCE:

1. *HCO PL 27 Nov 71 Exec Series 3 MONEY
2. *HCO PL 3 Dec 71 Exec Series 4 EXCHANGE
3. DEMO: How exchange and money are used in FP.
4. HCO PL 28 Feb 65 DELIVER
5. ESSAY: What happens to the Financial Planning when the delivery in an org is out.
6. HCO PL 28 Mar 65 EMERGENCIES & ACCOUNTS
PERSONNEL
7. HCO PL 11 Nov 69 ACCOUNTS AND PRO
8. DEMO: How doing a good FP strengthens the PRO of the org.
9. *HCO PL 9 Mar 72 I Finance Series 11
INCOME FLOWS AND POOLS
PRINCIPLES OF MONEY
MANAGEMENT
10. DEMO: Steps A-L.
11. CLAY DEMO: How an org makes lots of money.
12. DRILL: Do TR 0 on money to a win.
13. DRILL: Do TR 0 on a PO to a win, then on an EPO.
14. DRILL: Do Reach and Withdraw on money to a win.
15. HCO PL 18 Jan 65 FINANCIAL MANAGEMENT
BUILDING FUND ACCOUNT
16. DEMO: (a) How one creates the Income potential of an org using FP.
(b) The 19 stable data.
17. HCO PL 28 Jan 65 HOW TO MAINTAIN CREDIT
STANDING AND SOLVENCY
18. DEMO: The seven steps in the secret of solvency.
19. HCO PL 2 Jun 59 A COMMENT ON FINANCE
20. CLAY DEMO: The answer to Financial problems.
- 21.
- 22.
- 23.

IV. ALLOCATION:

1. HCO PL 28 Sep 79 I Finance Series 18
INTRODUCTION TO THE NEW
FINANCE SYSTEM

- | | | | | |
|-----|---|--|-------|-------|
| 3. | CLAY DEMO: How the org gets its allocation for FP. | | | |
| 4. | HCO PL 23 Jan 66 | ACCOUNTING POLICIES OF SCIENTOLOGY COMPANIES | _____ | _____ |
| 5. | HCO PL 9 Nov 74 | REFUNDS AND REPAYMENTS | _____ | _____ |
| 6. | DEMO: The four reasons an org has refunds and repayment requests. | | _____ | _____ |
| 7. | HCO PL 26 Oct 75 | GROSS INCOME/CORRECTED GROSS INCOME RATIO FAILED CASES AND FAILED STUDENTS | _____ | _____ |
| 8. | DEMO: How the org FP refunds, repayments. | can be lowered due to | _____ | _____ |
| 9. | HCO PL 6 Oct 66 IIR Rev. & Reiss. 12.7.76 | ADDITION TO HCO DIV ACCOUNT POLICY | _____ | _____ |
| 10. | HCO PL 15 Oct 65 Reiss. 11.2.79 | FIELD STAFF MEMBER | _____ | _____ |
| 11. | HCO PL 20 Jan 79 | INCOME CUTATIVES AND SALARY SUM | _____ | _____ |

V. FINANCIAL PLANNING:

- | | | | | |
|-----|--|--|-------|-------|
| 1. | *HCO PL 26 Nov 65 | FINANCIAL PLANNING | _____ | _____ |
| 2. | CLAY DEMO: What financial planning means. | | _____ | _____ |
| 3. | BPL 4 Sep 71 Rev. & Reiss. 16.8.65 as BPL | FP AND NECESSITIES | _____ | _____ |
| 4. | *HCO PL 13 Feb 71 | FINANCIAL PLANNING TIPS | _____ | _____ |
| 5. | ESSAY: Write down an example of each one and how you will apply the examples in the PL to maintain an on-policy FP. | | _____ | _____ |
| 6. | FO 588/ED 1006 INT 28 Mar 68 | ESSENCE OF FINANCIAL PLANNING | _____ | _____ |
| 7. | BPL 1 Mar 71 Rev. & Reiss. 18.7.75 as BPL | Finance Series 4R INCOME SOURCES | _____ | _____ |
| 8. | HCO PL 28 Sep 79 III | Finance Series 20 FINANCIAL PLANNING PROGRAM NUMBER 1 | _____ | _____ |
| 9. | HCO PL 20 Oct 78 | Finance Series 17 TWO-BIT FP | _____ | _____ |
| 10. | LRH ED 74 INT | SOLVENCY | _____ | _____ |
| 11. | HCO PL 18 Jan 69 II | PLANNING AND TARGETS | _____ | _____ |
| 12. | DRILL: Choose something that needs to be done and draw up a complete plan on how to do it. | | _____ | _____ |
| 13. | HCO PL 13 Nov 70 | Org Series 13 PLANNING BY PRODUCT | _____ | _____ |
| 14. | DRILL: List down the product you would like to achieve from FP and then list the things you would have to do to get the product. | | _____ | _____ |
| 15. | HCO PL 25 Mar 71 | Org Series 26 VALUABLE FINAL PRODUCTS | _____ | _____ |
| 16. | CLAY DEMO: How the FP members can achieve the VFPs of the org using Financial Planning. | | _____ | _____ |
| 17. | HCO PL 20 Nov 65 | THE PROMOTIONAL ACTIONS OF AN ORGANIZATION | _____ | _____ |
| 18. | ESSAY: How doing the promotional actions of your Div will contribute to the making of a good FP. | | _____ | _____ |
| 19. | HCO PL 28 Jul 74 | ADDITIONS TO HCO PL 20 NOV 65 THE PROMOTIONAL ACTIONS OF AN ORGANIZATION | _____ | _____ |
| 20. | *LRH ED 245R INT | FP CHECKLIST FOR PROMO ACTIONS OF AN ORG | _____ | _____ |

- 21. *LRH ED 245R-1 INT IN A MEETING WITH FBOs... _____
- 22. CLAY DEMO: How the handling of Income (FP, Disbursement) will reflect in GI and Delivery. _____
- 23. HCO PL 9 Nov 68 STANDARD ADMIN _____
- 24. HCO PL 25 Nov 70 POLICY AND ORDERS _____
- 25. HCO PL 6 Dec 70 Pers Series 13, Org Series 18 THIRD DYNAMIC DE-ABERRATION _____
- 26. ESSAY: How you as an FP member can ensure the org stays solvent, viable and on-Source. _____
- 27. HCO PL 20 Oct 67 Admin Know-How CONDITIONS HOW TO ASSIGN _____
- 28. HCO PL 3 Mar 70 HOW TO WRITE AN ED OR ORDER _____
- 29. DRILL: Write up an Executive Directive regarding FP and solvency. _____
- 30. _____
- 31. _____
- 32. _____

VI. DIVISIONAL RESPONSIBILITY:

- 1. HCO PL 16 Apr 65 III ALL DIVISIONS HANDLING Reiss. 24 Dec 78 THE PUBLIC INDIVIDUAL _____
- 2. HCO PL 24 Aug 65 II CLEANLINESS OF QUARTERS AND STAFF IMPROVE OUR IMAGE _____
- 3. HCO PL 17 Jun 69 THE ORG IMAGE _____
- 4. HCO PL 11 Dec 69 APPEARANCES IN PUBLIC DIVS _____
- 5. ESSAY: How will appearances help to increase the income. _____
- 6. HCO PL 21 Nov 68 SENIOR POLICY _____
- 7. *HCO PL 30 Jul 68 GROSS INCOME SENIOR DATUM _____
- 8. HCO PL 18 Nov 69 I CENTRAL FILES VALUE OF _____
- 9. ED 805 INT/FO 340 SPEED OF SERVICE (OEC Vol 5, pg. 84) _____
- 10. HCO PL 19 Mar 68 SERVICE _____
- 11. CLAY DEMO: How you as a Div Head can use the above PLs to increase your allocation. _____
- 12. _____
- 13. _____
- 14. _____

VII. SUBMISSIONS TO FP:

- 1. *HCO PL 2 Jun 59 PURCHASING LIABILITY OF STAFF MEMBERS _____
- 2. HCO PL 20 Jun 61 PURCHASE ORDER SYSTEM _____
- 3. *HCO PL 15 May 70 III PURCHASE ORDERS _____
- 4. DEMO: The reason for purchase orders. _____
- 5. *BPL 4 Nov 70R ESTIMATED PURCHASE ORDERS Rev. & Reiss. 3.10.75 as BPL _____
- 6. CLAY DEMO: The cycle of wanting an item, to writing the EPO, to the PO and then the obtaining of the item. _____

- 7. HCO PL 22 Oct 71RE Finance Series 10RB
Rev. 9.6.79 PURCHASING AND CHECK
SIGNING LINES MODIFIED
- 8. HCO PL 21 Nov 62 Reissue Series 6
COMPLETED STAFF WORK -
HOW TO GET APPROVAL OF
ACTIONS AND PROJECTS
- 9. **DRILL:** Write a CSW for an item needed, for FP,
and show how the item will aid production and
that there is already production occurring that
would warrant the item.
- 10. HCO PL 21 Nov 65 CHEQUE SIGNING
- 11. HCO PL 30 Jan 66 IV ACCOUNTING CHEQUE SIGNERS
CHEQUE SIGNING PROCEDURE

- 13. BPL 11 Nov 66R POSTAL ECONOMY
Rev. & Reiss. 9 Aug 75 as BPL
- 14.
- 15.
- 16.

VIII. EQUIPMENT:

- 1. *HCO PL 3 Nov 65 EQUIPMENT
- 2. HCO PL 15 Feb 64 THE EQUIPMENT OF
ORGANIZATIONS
- 3. **ESSAY:** How proper FP approval on certain
equipment can expand the org.
- 4. BPL 18 Nov 69R DISPOSAL OF ORG ASSETS
Rev. & Reiss. 23.7.75 as BPL
- 5.
- 6.
- 7.

IX. FP PERSONNEL:

- 1. *HCO PL 12 May 72 Exec Series 13, Finance
Series 12, Personnel Ser-
ies 25 PTS PERSONNEL
AND FINANCE
- 2. **CLAY DEMO:** Why someone who is PTS should not
be on the income or finance lines.
- 3.
- 4.
- 5.

ADDITIONS AND CORRECTIONS:

- 1.
- 2.
- 3.
- 4.
- 5.

STUDENT COURSE COMPLETION:

A. STUDENT COMPLETION: I have completed the requirements of this checksheet and I know and can apply this material.

STUDENT ATTEST: _____ DATE: _____

B. SUPERVISOR ATTEST: I have trained this student to the best of my ability and he has completed the requirements of this checksheet and knows he can apply the checksheet data.

SUPERVISOR: _____ DATE: _____

CERTS AND AWARDS:

A. If student is Fast Flow, attests:

- (a) I have enrolled properly on the course.
- (b) I have signed a no-charge invoice for the course.
- (c) I have studied and understand all the materials of this checksheet.
- (d) I have done the drills on this checksheet.
- (e) I can produce the results required in the materials of this course.

STUDENT ATTEST: _____ DATE: _____

CERTS AND AWARDS: _____ DATE: _____

B. If student is not Fast Flow, have him write exam:

EXAM GRADE: _____ EXAMINER: _____

C. When student has passed, issues Certificate of FULLY HATTED FP MEMBER.

CERTS AND AWARDS: _____ DATE: _____

(Route to Course Admin for filing in student folder.)

THE BOARDS OF DIRECTORS
of the
CHURCHES OF SCIENTOLOGY