



Seminars by Request

Host preparation notes and checklist.

Topic ideas and questions:

Timeframe:

Location Considerations:





- Submit Seminars by Request web form: <https://www.cu.edu/employee-services/forms/request-financial-education-workshop>
- Receive response from Financial Wellness team (3-5 business days)
- Schedule meeting or call with Financial Wellness team member
- Finalize topic
- Finalize date and time
- Finalize location
- Receive flyer and registration link
- Distribute flyer/ link to potential audience
- Receive final check-in from Financial Wellness team 3-5 business days prior to the event
- Arrive at event 20 minutes early (or designate an alternate host to do so)
- Schedule debrief call or meeting with Financial Wellness team member
- Receive email with link to online feedback form
- Receive event participant feedback from Financial Wellness team member

