

Request a Healthy, Wealthy and Wise Talk ^[1]

Help your team invest in their futures. Schedule a Healthy, Wealthy and Wise Talk at your office.

Together with the university's retirement plan service providers, Employee Services will deliver high-quality benefits and financial education to faculty and staff from the convenience of your office. It's information that will benefit them for years to come. You can choose presentation topics, dates, times and locations to fit your team's needs—these talks can be a perfect fit for your next staff meeting or retreat.

Request a talk ^[2]



- [Topics](#)
- [Get Started](#)

Choose from a wide range of benefits and personal finance topics for your team. When you're ready to request your talk, click the **Get Started** tab.

Benefits topics

The Employee Services Benefits Outreach group is currently booking talks for January and February 2020. All 2019 workshop slots are reserved.

| Talk | Description | Presenter |
|--|--|-------------------|
| Basics of CU Health Plans | What is an HMO? How can your healthcare dollars be maximized? What's covered with preventative care? This workshop discusses the basics of CU's Medical, Dental and Vision plans to help you choose a plan or better understand and use your current plans. | Employee Services |
| Pre-tax Savings, HSA & FSA: What's the Difference? | Learn the difference between a Health Savings Account (HSA) and a Flexible Spending Account (FSA), how much you can save, what a qualifying expense is, how the pretax savings options can benefit you and help you save on qualifying medical and dependent care expenses. | Employee Services |
| Creating Streams of Income: Maximizing CU Retirement Plans | It is never too early to start planning for retirement, as this workshop for early to mid-career employees will show you. CU makes great efforts to help you create retirement income streams. Learn how your mandatory retirement plan is working for you. Get a detailed look at CU voluntary retirement plans to help you know which ones can provide for you in retirement. Gain an understanding of how time and compounding interest can impact your savings, and an understanding of how a Health Savings Account can become a valuable income stream to cover qualifying medical expenses now and into retirement. | Employee Services |

| | | |
|--|---|-------------------|
| Retiring from CU: Planning for the Day | <p>Retirement is on the horizon, it is time to take a look and assess how you are doing. In this workshop for PERA and 401(a) participants within five years of retirement, review the basics to prepare you to retire with CU. Take time to reassess the cost to retire and evaluate if your retirement savings are on track. Learn how to maximize contribution limits and catch-up contributions for CU voluntary plans. Find out the difference between early and normal retirement and how it impacts the cost of your retiree benefits.</p> | Employee Services |
| A Seamless Transition: Transitioning from a CU Active Employee to a CU Retiree | <p>What is the process to retire from CU? Learn about the final months before retirement and how CU benefit professionals will guide you through for a seamless transition into retirement. What retiree benefits are you eligible for? Are you eligible for early or normal retirement? When do active benefits end and retiree benefits begin? How does Medicare affect my retirement benefits? This session will prepare you for the final steps.</p> | Employee Services |
| CU Active Employment Past Age 60 | <p>If you plan to delay retirement until your sixties, this talk will show you how remaining an active employee on a CU Health Plan impacts your (and your dependent's) Medicare options and teach you how to avoid the pitfalls Medicare and Social Security have on your ability to contribute to your Health Savings Account (HSA).</p> | Employee Services |

Retirement topics for CU 401(a) Retirement Plan participants

Each talk begins with a refresher on the University of Colorado 401(a) Mandatory Retirement Plan and the CU 403(b) Voluntary Retirement Plan.

| | | |
|-------------|--------------------|------------------|
| Talk | Description | Presenter |
|-------------|--------------------|------------------|

| | | |
|---|---|------|
| 1:1 Personal Consultations | CU employees can schedule to one-on-one sessions with financial professionals from TIAA. These sessions are available at no additional cost to employees. You can schedule a day of one-hour sessions for your team, giving them access to personalized advice from the convenience of your office. | TIAA |
| Get a Head Start: A Step-by-step Overview of Your Plan | This presentation discusses the ins and outs of plans offered, the advantages of participating in your retirement program, how to create a retirement strategy and update your account with TIAA. | TIAA |
| Inside Money: Managing Income and Debt | Learn how to help make money work, the importance of cash flow and how to use it, saving and spending and understanding debt and how to manage it. | TIAA |
| Gaining Insight: Navigating Debt Consolidation and Understanding the Mortgage Process | Increase your understanding of debt, how to manage it, and identify how debt consolidation could work for you. Plus, demystify the mortgage process and what you need to know when it comes to borrowing money for a home. | TIAA |
| The Starting Line: Why and How Retirement Saving Should Begin Now | This presentation discusses the importance of planning early, maximizing your retirement plan contributions and how understanding asset allocation principles affects the management of financial objectives. | TIAA |
| Tomorrow in Focus: Saving for your Ideal Retirement | Learn about retirement saving and planning, the real benefit of time in regards to saving and the essential features of retirement investments. | TIAA |

| | | |
|---|--|------|
| Halfway There | This financial checkup will help you evaluate your current savings, manage competing savings priorities (college savings, short-term savings and more), formulate a plan to reach your savings goals and identify what to do when life throws you a curveball, such as caring for elderly parents. | TIAA |
| Money at Work 1: Foundations of Investing | Expand your understanding of the role of investing, protecting against various risks, augmenting traditional savings programs to help accelerate retirement savings and the products and tools available to manage a growing portfolio. | TIAA |
| Money at Work 2: Sharpening Investment Skills | Learn how to expand your portfolio to maximize potential growth and manage risk - scenarios and alternative investing vehicles to help manage more complex financial needs. | TIAA |
| Paying Yourself: Income Options in Retirement | Learn about basic rules that govern the most common retirement accounts, when to tap into different assets and flexible income choices offered by TIAA. | TIAA |
| Within Reach: Transitioning from Career to Retirement | So it's time to retire, now what? Make some final preparations to help shift from an active career to retirement. From income options to taxes to health insurance, you need to be prepared. | TIAA |

Retirement topics for PERA participants

| Talk | Description | Presenter |
|------|-------------|-----------|
|------|-------------|-----------|

| | | |
|---------------------------------|--|------|
| PERA Fundamentals | Learn how the monthly lifetime benefit is calculated, annual increases on the benefit, choices upon terminating PERA-covered employment, built-in survivor and disability benefits, access to 401(k) and 457 voluntary tax-deferred savings plans, availability of post-retirement health insurance plans and much more. (Talk also available in Spanish.) | PERA |
| PERA: Purchasing Service Credit | Review requirements and other information to help you decide whether to purchase service credit. | PERA |
| PERA Retirement Process | Review the retirement application process for the PERA Defined Benefit Plan, and learn about required PERA retirement forms and post-retirement issues. | PERA |
| PERACare | Learn about the PERACare Health Benefits Program, including eligibility, pre-Medicare and Medicare plan choices, prescription benefits and other topics. | PERA |
| PERAPlus | This 60-minute interactive presentation focuses on the importance of saving extra money for retirement through a PERA 401K and/or a 457 plan. Using case studies, real life scenarios and retirement calculators, the presentation helps you to create your own personalized savings goals. | PERA |
| Recent Changes to PERA | This talk discusses the changes to PERA benefits related to Senate Bill 18-200. It details what the changes are, who they will impact, when they will occur and why SB-200 is important to PERA's funding status. | PERA |

Ready to get started?

1. **Download our checklist.** ^[3]
2. **Choose a topic.** The topic you choose should reflect the interests of your department or group. Please refer to the Topics tab above for details.
3. **Submit your talk request online** ^[2]. We will contact you within 3-5 business days of receiving your request to discuss your group's programming needs.

4. **Select a date and time.** We ask for 8 weeks' notice, which give you the widest range to available dates and times.
Some things to consider:
What makes the most sense for your department or group?
Is it easier for them to meet before, during or after the work day?
Would a lunch-hour brown bag session be a good fit?
What about bringing in a speaker during your next departmental meeting?
5. **Pick a location.** The final piece of the puzzle is finding a room large enough to accommodate the anticipated audience. If you have access to a room with a projector and adequate seating, great! If you could use some assistance, we can help book a room on any CU campus.

Next steps

Advertising

If you request one, we will send you a marketing flier to use for advertising. On the flier, your department or group will be credited with hosting the talk, and your name will be listed as the contact person.

Registration

We will send you a registration link to distribute to your prospective audience and the same link will be embedded in the flier. When registering, participants will be asked for their names and email addresses, and space is provided to add questions for the speaker or to indicate what they want to learn. This information is given anonymously to the presenter so he/she can prepare to address your group.

Before the presentation

The day of the presentation you (or your delegate) should plan to arrive at the room 20 minutes early to ensure set up goes smoothly for the speaker.

After the presentation

Shortly after the presentation, we will contact you to see how things went from your perspective and send an email to your group with a link to an anonymous online feedback form. Information collected will be shared with you and the presenter, and will be used to guide improvements to future workshops.

If you have additional questions, please email es.communications@cu.edu [4].

Groups audience: Employee Services

Source URL: <https://www.cu.edu/employee-services/benefits-wellness/current-employee/retirement-plans/healthy-wealthy-wise>

Links

- [1] <https://www.cu.edu/employee-services/benefits-wellness/current-employee/retirement-plans/healthy-wealthy-wise>
- [2] <https://www.cu.edu/employee-services/forms/request-healthy-wealthy-and-wise-talk>
- [3] <https://www.cu.edu/docs/healthy-wealthy-and-wise-checklist>
- [4] <mailto:es.communications@cu.edu>