

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

Request and schedule a benefits or financial talk to come to your office, and help your team invest in their futures.

- **Please submit your request at least 8 weeks before your desired presentation date.**
- Seminars require a minimum number of 10 participants.

CONTACT INFORMATION

First Name *

Last Name *

Email *

Phone *

Department or Group Affiliation *

(e.g., Engineering Department; Transportation Services; Staff Council)

Campus *

- Boulder
- Colorado Springs
- Denver
- Anschutz
- System

CHOOSING A WORKSHOP

Select your talk or talks by checking the boxes below.

BENEFITS TOPICS

- Basics of CU Health Plans
- Pretax Savings, HSA & FSA: What's the Difference?
- Creating Streams of Income: Maximizing CU Retirement Plans

- Retiring from CU: Planning for the Day
- A Seamless Transition: Transitioning from a CU Active Employee to a CU Retiree
- CU Active Employment Past Age 60

RETIREMENT TOPICS FOR CU 401(a) PARTICIPANTS

- 1:1 Personal Consultations
- Inside Money: Managing Income and Debt
- Gaining Insight: Navigating Debt Consolidation and Understanding the Mortgage Process
- The Starting Line: Why and How Retirement Saving Should Begin Now
- Tomorrow in Focus: Saving for your Ideal Retirement
- Get a Head Start: A Step-by-step Overview of Your Plan
- Halfway There
- Money at Work 1: Foundations of Investing
- Money at Work 2: Sharpening Investment Skills
- Paying Yourself: Income Options in Retirement
- Within Reach: Transitioning from Career to Retirement

RETIREMENT TOPICS FOR PERA PARTICIPANTS

- PERA Fundamentals
- PERA: Purchasing Service Credit
- PERA Retirement Process
- PERACare
- PERAPlus
- Recent Changes to PERA

SCHEDULING A WORKSHOP

Do you have a target date/timeframe in mind for when you'd like to schedule the workshop/session? *

- No
- Yes (Please specify below.)

Approximately how many employees would attend the workshop or meeting *

Additional Comments

If you have additional details or requests, please enter them here.

Submit

Source URL: <https://www.cu.edu/employee-services/forms/request-healthy-wealthy-and-wise-talk>

Links

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