

How to Host Your Own



*An outreach initiative of the Tennessee Society of CPAs and
the American Institute for Certified Public Accountants*



Hosting a Financial Fitness Day can be a rewarding experience! Volunteering to help college students learn about financial literacy, budgeting and credit management can equip them with the information and tools needed to take charge of their financial future.

The TSCPA Financial Fitness Day Toolkit includes:

- **“Financial Wisdom for College Success”**
A PowerPoint presentation that can be customized to fit your needs.
- **“How Financially Fit are You?” Quiz**
With questions pulled from the presentation, this quiz can help make your presentation interactive.
- **Informational Fliers**
Get the information into the hands of the students who need it most. Topics covering money management, budgeting, identity theft and understanding financial aid can be downloaded and printed for hand-outs.
- **Event Signage**
Download and print the customizable poster and table sign to promote your event
- **Press Release Template**
Promote your event through local newspapers and school websites with this press release template.

Creating a Timeline for Your Financial Fitness Day

3-6 months out

- Contact area colleges to coordinate hosting a Financial Fitness Day for students.
- Meet with school officials to discuss logistics and schedule date.

2-3 months out

- Find 2-4 volunteers depending on school size.
- Confirm details with school contacts.

1 month out

- Using the template included in your Financial Fitness Day Toolkit, create and distribute your press release to local and university newspapers. Ask the university if they would include this press release on their website.
- Download and print the school-specific posters (listing school, date and time).
- Download and print informational handouts for students.
- Provide volunteers with a confirmation and additional details.

2 weeks out

- Touch base with school contacts.
- Practice your presentation.

1 week out

- Hang posters on campus, in the university bookstore and in local coffee shops.
- Send a reminder email to all volunteers.

How to Get Started:

Location: Selecting a location can be paramount in hosting a successful event. Consider choosing a location that is frequented by college students, such as a university student center, local school or coffee shop near a college campus. If you are setting up on campus, work with the university administration office to receive approval prior to hosting your event.

If you plan to make a presentation, make sure the meeting space has a projector and screen available if you don't already have one. A presentation is optional and a simple Financial Fitness Day Booth is a versatile option.

Time: Typically the best times for a Financial Fitness Day is during student lunch hours or during the afternoon hours between classes, if on-campus. If off-campus, evening hours are best. Be sure to arrive at your location 30 minutes prior to your event to get set up.

Volunteers: Hosting an event by yourself can be a little overwhelming! Having 2-4 volunteers can make your event run much smoother. If you need help getting volunteers, ask your local university accounting professor if they have a couple of students they would recommend to help.

What to take with you:

- Materials (fliers, quizzes, pens, table sign, etc)
- Powerpoint Presentation (if presenting)
- Small box or bowl for students to drop completed quizzes in

Day of Event:

Set up your Financial Fitness Day Table with the customizable signage and make available the fliers for students to pick up and take with them.

Volunteers should recruit students to come over to the table to take the quiz to see if they are financial fit. This can be a great networking opportunity for the students to talk to you before and after the presentation and ask you any questions they may have.

Quiz questions are pulled from the presentation materials and include contact information that can be filled out and submitted for a prize drawing, if desired.

Post Event:

Utilize the contact information on the quizzes to follow-up with students on their personal financial planning needs.

Thank you for volunteering!

Questions?

Contact Aleshia Garrett at the Tennessee Society of CPAs at agarrett@tscpa.com or 615/377-3825 for more information.

