

OECD-Russia Global Symposium

**Advancing financial literacy  
globally: implementation and  
innovation**

**DRAFT AGENDA**

**4-5 October 2018  
Moscow, Russian Federation**

Simultaneous interpretation in English and Russian will be available during the Symposium





## Day 1

**09:00 – 10:00**      **Registration and welcome coffee**

**10:00 – 10:10**      **Welcome and opening remarks**

**10:10 – 11:25**      **Session 1: Global progress on financial literacy**

This session will look at the progress made to develop robust and effective policies for financial education and financial literacy since the G8 meeting in 2006, taking into account evidence globally including survey data of adults and students, and the continuing growth in the number of countries with a National Strategy for Financial Education.

**Moderator**      **André Laboul**, Senior Counsellor, Directorate for Financial and Enterprise Affairs, and Special Advisor to the G20 Sherpa, OECD, and Chair of the OECD International Network on Financial Education (INFE)

**Speakers**

- **Sergei Storchak**, Deputy Minister, Ministry of Finance, Russian Federation
- **Mariela Zaldivar**, Deputy Superintendent of Market Conduct and Financial Inclusion, Superintendency of Banks, Insurance and Private Pensions, Peru
- **Lyndwill Clarke**, Head of Department: Consumer Education, Financial Sector Conduct Authority, Republic of South Africa

**11:25 – 11:40**      **Keynote: Ageing and Financial Inclusion**

**Eiichiro Kawabe**, Deputy Commissioner for International Affairs, Financial Services Agency, Japan

**11:40 – 12:10**      **Coffee break**

**12:10 – 13:00**      **Session 2: Levels of financial literacy at a regional and global level**

The OECD has developed tools and methods to measure the financial literacy of adults and youth. These instruments have been used in many countries, and the data has been collected in regional and global reports. In addition to comparing levels of financial literacy across countries, such data also provide important insights into the variations across target groups such as women or older generations. This session will look at the conclusions of such data collection in terms of financial literacy and financial education, and include the results of a new exercise in Eurasia funded by the Ministry of Finance of the Russian Federation.

**Moderator**      **Adele Atkinson**, Senior Policy Analyst, OECD

**Speakers**

- **Chiara Monticone**, Policy Analyst, OECD
- **Olaf Simonse**, Head of the Moneywise Platform, Ministry of Finance, the Netherlands
- **Sarjito**, Deputy Commissioner in Financial Education and Consumer Protection, Financial Services Authority, Indonesia

**Discussant**      **Guzelia Imaeva**, Director, National Agency for Financial Studies, Russian Federation

<b>13:00 – 13:30</b>	<b>Keynote: Financial Literacy Trajectories</b>
	<b>Paul Gerrans</b> , Professor of Finance, University of Western Australia Business School
<b>13:30 – 14:30</b>	<b>Lunch</b>
<b>14:30 – 16:30</b>	<b>Session 3: Digitalisation of financial services and its implications for financial literacy, including for younger generations</b>
	Digital finance is changing the way that people access financial products and services and interact with providers. This session will look at how this is being incorporated in financial education policy, and whether there are specific challenges for children and young people.
<b>Moderator</b>	<b>Flore-Anne Messy</b> , Head of the Insurance, Private Pensions and Financial Markets Division, Directorate for Financial and Enterprise Affairs, OECD, and Executive Secretary of the OECD/INFE
<b>Speakers</b>	<ul style="list-style-type: none"> <li>➤ <b>Verónica Frisancho</b>, Senior Research Economist, Inter-American Development Bank</li> <li>➤ <b>Annamaria Lusardi</b>, Denit Trust Endowed Chair of Economics and Accountancy, George Washington University School of Business, and Academic Director, Global Financial Literacy Excellence Center, United States</li> <li>➤ <b>Musheg Arakelyan</b>, Senior Director, BPO, Visa, Russian Federation</li> <li>➤ <b>Roeland Monasch</b>, CEO, Aflatoun</li> </ul>
<b>16:00 – 16:30</b>	<b>Coffee break</b>
<b>16:30 – 17:30</b>	<b>Session 4: Financial education for key target audiences</b>
	This session will look at the financial literacy needs of various key target audiences, including the most vulnerable.
<b>Moderator</b>	<b>Anna Zelentsova</b> , Advisor, Ministry of Finance, Russian Federation
<b>Speakers</b>	<ul style="list-style-type: none"> <li>➤ <b>Susan Thorp</b>, Professor of Finance, University of Sydney Business School</li> <li>➤ <b>Kiril Kossev</b>, Policy Analyst, OECD</li> </ul>
<b>17:30 – 17:45</b>	<b>Closing of day 1</b>
<b>18:00</b>	<b>Cocktail hosted by the Ministry of Finance, Russian Federation</b>

## Day 2

**09:30 – 09:50**      **Registration and welcome coffee**

**09:50 – 10:10**      **Welcome and day 1 highlights**

**Flore-Anne Messy**, Head of the Insurance, Private Pensions and Financial Markets Division, Directorate for Financial and Enterprise Affairs, OECD, and Executive Secretary of the OECD/INFE

**10:10 – 11:30**      **Session 5: Innovative approaches to financial education delivery**

Financial education providers use a wide range of delivery channels to ensure that they reach all target groups. This session will focus particularly on recent, innovative information campaigns and edutainment

**Moderator**      **Diane Maxwell**, Retirement Commissioner, Commission for Financial Capability, New Zealand

**Speakers**

- **Maria Lucia Leitão**, Head of Banking Conduct Supervision Department, Bank of Portugal
- **Ellie Chiu**, Research and Evaluation Manager, Investor Education Centre, Hong Kong, China
- **Jonathan Hollow**, Head of Financial Capability, Strategy & Innovation, Money Advice Service, United Kingdom
- **Anna Zelentsova**, Advisor, Ministry of Finance, Russian Federation

**Discussant**      **Paul Gerrans**, Professor of Finance, University of Western Australia Business School

**11:30 – 12:00**      **Coffee break**

**12:00 – 13:20**      **Session 6: Financial education and consumer protection to improve credit decisions and outcomes**

This session will cover both financial education and financial consumer protection related to credit. Taking into account the perspective and responsibility of policy makers, the private sector (including microfinance) and not-for-profits, it will explore how credit is marketed, distributed and managed.

**Moderator**      **Olaf Simonse**, Head of the Moneywise Platform, Ministry of Finance, the Netherlands

**Speakers**

- **Sue Lewis**, Chair, Financial Services Consumer Panel, United Kingdom
- **Armenak Darbinyan**, Board Member, Central Bank of Armenia
- **Dmitriy Yanin**, Chairman, International Confederation of Consumer Societies (KONFOP)

**Discussant**      **Annamaria Lusardi**, Denit Trust Endowed Chair of Economics and Accountancy, George Washington University School of Business, and Academic Director, Global Financial Literacy Excellence Center, United States

**13:20 – 13:30**

**Highlights and closing remarks**

- **Andrey Bokarev**, Director of the Department for International Financial Relations, Ministry of Finance, Russian Federation
- **André Laboul**, Senior Counsellor, Directorate for Financial and Enterprise Affairs, and Special Advisor to the G20 Sherpa, OECD, and Chair of the OECD/INFE

**13:30 – 14:30**

**Lunch**