

AGENDA
CONFERENCE ON FINANCIAL EDUCATION
 New Delhi, India
 21-22 September, 2006

THURSDAY, 21 SEPTEMBER 2006

8:30 – 9:00 PARTICIPANTS' REGISTRATION

INAUGURAL SESSION: 9:00-9:45

Welcome address: Mr. D. Swarup, Chairman, Pension Fund Regulatory and Development Authority, India

Address by: Mr. Tomas Prouza, Deputy Minister of Finance, Czech Republic
 Mr. Erich Harbrecht, Deputy Chair of the OECD Committee on Financial Markets, Deutsche Bundesbank, Germany
 Mr. Andre Laboul, Head, Financial Affairs Division, OECD

Inaugural address: Dr. Y.V. Reddy, Governor, Reserve Bank of India

Vote of Thanks: Ms. Meena Chaturvedi, Executive Director, PFRDA.

COFFEE BREAK: 9:45-10:00

PART I: PUBLIC ACTION

SESSION 1: 10:00-11:20

DEVELOPING NATIONAL INITIATIVE TO ADVANCE FINANCIAL LITERACY

Moderator: Dr. Rajiv Kumar, Director & CE, Indian Council for Research on International Economic Relations, India

Speakers: Ms. Barbara Smith, OECD Consultant; *What makes a successful Public Action Campaign?*
 Ms. Brenda Gibson, Financial Services Authority, United Kingdom
Benchmarking Financial Literacy Survey – quantifying literacy levels and the role of government in financial literacy campaigns
 Mr. Peter McCray, General Manager, Financial Literacy Advisory Board, Australia; *Australian National Strategy in improving financial literacy*

Discussant: Ms. Monika Halan, Editor, Outlook Money, India

COFFEE BREAK: 11:20-11:30

SESSION 2: 11:30-13:00**IMPORTANCE OF TARGETING FINANCIAL EDUCATION
CAMPAIGNS TO VULNERABLE GROUPS**

- Moderator:** Professor Mukul Asher, National University of Singapore
- Speakers:** Professor Sarah Mavrinac, Professor INSEAD, Singapore, *Problems with vulnerable groups in Asia*
Dr. K .P Krishnan, Joint Secretary (Capital Markets & Pension Reforms), Ministry of Finance, Government of India.
- Discussant:** Ms. Jayshree Vyas, Managing Director, Self Employed Women's Association (SEWA), India

Lunch 13:00 – 14:30

PART II: ROLE OF FINANCIAL INSTITUTIONS**SESSION 3: 14:30 – 16:00****ROLE OF FINANCIAL INSTITUTIONS IN FINANCIAL EDUCATION**

- Moderator:** Mr. André Laboul, Head, Financial Affairs Division, OECD
OECD Good Practices for Role of Financial Institutions in Financial Education
- Speakers:** Mr. U.K. Sinha, Chairman and Managing Director, UTI Asset Management Company, India
Mr. T. S. Vijayan, Chairman, Life Insurance Corporation of India (LIC)
Mr. Ashok Vaswani, CEO, Citigroup Asia Pacific Consumer Banking, Singapore ; *Financial Education at Citibank in Asia Pacific*
- Discussant:** Ms. Shikha Sharma, CEO, ICICI Life

COFFEE BREAK 16:00 – 16:30

SESSION 4: 16:30 – 18:00**HOW TO PRESENT FINANCIAL INFORMATION – ROLE OF DISCLOSURE
IN COMPLEMENTING FINANCIAL LITERACY CAMPAIGNS**

- Moderator:** Dr. Ashok Lahiri, Chief Economic Advisor, Ministry of Finance,
Department of Economic Affairs, Government of India
- Speakers:** Mr. G. Anantharaman, Member, Securities & Exchange Board of
India
Mr. Tomáš Prouza, Deputy Minister of Finance, Czech Republic
Republic ; *Country Case Study – Czech Republic*
Ms. Ivy Lai, Head of Investor Education and Communications,
Securities and Futures Commission, Hong Kong, China
Country Case study – Hong Kong, China
- Discussants:** Mr. A.Viswanathan, Central Provident Fund Commissioner,
EPFO, India
Mr. T. N. Manoharan, President, Institute of Chartered Accountants
of India.

**DINNER RECEPTION HOSTED BY CHAIRMAN, PFRDA AT RANI BAGH, HOTEL TAJ
PALACE, SARDAR PATEL MARG, NEW DELHI : 8:00 PM**

FRIDAY, 22 SEPTEMBER 2006

PART III: FINANCIAL EDUCATION FOR RETIRMENT SAVINGS**SESSION 5: 9:00 – 11:00****FINANCIAL EDUCATION AND PENSIONS**

- Moderator:** Mr. D. Swarup, Chairman, PFRDA, India
- Speakers:** Ms. Fiona Stewart, OECD
*Interactive Discussion on OECD guidelines relating to
financial education and pensions*
Ms. Mary Hutch, Head of Information and Training, Pension
Board, Ireland
Country Case study – Ireland
- Discussants:** Mr. S.Krishnamurthy, CEO & Managing Director, SBI Life Insurance
Co Ltd, India
Mr. Gautam Bhardwaj, Director, Invest India Economic Foundation

COFFEE BREAK : 11:00-11:30

SESSION 6: 11:30 – 13:30**FINANCIAL EDUCATION AND INSURANCE**

- Moderator:** Mr. C. S Rao, Chairman, Insurance Regulatory and Development Authority, India
- Speakers:** Ms. Flore-Anne Messy, OECD
Challenges of financial education in insurance sector
Mr. S.V. Mony, Secretary General, Life Insurance Council, India
- Discussants:** Mr. Walter Bell, National Association of Insurance Commissioners, United States of America
Dr. Wilhelm Ruprecht, German Insurance Association, Germany
Mr. K.C Mishra, Director, National Insurance Academy, Pune, India

LUNCH 13:30-15:00**PART IV: FINANCIAL EDUCATION PROGRAMMES****SESSION 7: 15:00 – 16:30****FINANCIAL EDUCATION PROGRAMMES**

- Moderator:** Mr. Vinod Rai, Secretary (Banking and Insurance), Ministry of Finance, Government of India
- Speakers:** Ms. Wendy van den Hende, Chief Executive, PFEG, United Kingdom
Financial Education Programmes relating to schools
Mr. C. B Bhave, Chairman and Managing Director, National Securities Depository Limited (NSDL), Mumbai, India
- Discussants:** Mr. Peter McCray, General Manager, Financial Literacy Advisory Board, Australia,
Mr. Sanjay Sachdev, Founder Member and Chairman, Financial Standards Board of India

CLOSING SESSION: 16:30 – 17:00

- Dr. Adarsh Kishore, Finance Secretary, Government of India
Mr. Eimon Ueda, Head, Outreach Unit for Financial Sector Reform, OECD
Mr. Andre Laboul; Head, Financial Affairs Division, OECD