

## OECD FINANCIAL EDUCATION PROJECT

### Questionnaire

*Preliminary remark: The Secretariat kindly requests that you focus your remarks on financial education issues that are especially relevant for the areas covered by the OECD body to which you belong. Delegates from the CMF are invited to focus on issues related to financial education in banking and securities area as well as “general” financial education issues related to savings and investment. Delegates from the Insurance Committee are invited to focus on insurance education issues (including life, non-life and large risks) and delegates from the Working Party on Private Pensions are invited to focus on financial education issues related to pensions. Please also differentiate as far as possible between financial education provided in schools and financial education provided outside of schools (for example, by employers or by community groups).*

1. Financial Education Programmes: Points of contact for obtaining information about programmes:

- Please identify the names and contact information (phone number, mailing address, e-mail address) of institutions/individuals in both the public and private sectors that we could contact to obtain information on the financial education programmes currently in existence, as well as those planned for the future.
  - \* *Public sector contacts:* Finance Ministry officials, Education Ministry officials, Labour Ministry officials, Central Bank officials, or other officials (please specify).
  - \* *Private sector contacts:* Institutions/individuals in positions of leadership in financial institutions, employer groups, community organization non-profit groups, universities, or other groups (please specify).

2. Financial Education Programmes: Issues, Priorities, Implementation, Effectiveness:

- How important is the level of financial education in your country? Is financial education a growing policy issue?
- What are the most important issues in financial education in your country? How would you rank these issues in terms of importance?
- What are the main obstacles to financial education in your country?
- Could you please summarize some major initiatives underway in your country and the organization(s) in charge of these programmes?
- Do you have any programmes providing information or publications to financial educators?
- Do you know of studies that have attempted to measure the implementation and effectiveness of selected financial education programmes? Could you provide us with copies of these studies or references that could be used in preparation of the preliminary report to be delivered by the end of this year?