



Programme

HIGH-LEVEL INTERNATIONAL CONFERENCE

Global and European Trends in Financial Education: New Challenges, Innovation and Measures of Success

**Co-organised by
the OECD and the Capital Markets Board of Turkey
with the support of the Turkish Treasury
and Central Bank of Turkey**

**22-23 May 2014
Istanbul, Turkey**

Thursday, 22 May 2014

09:00 - 9:30	Registration of participants and coffee in the Grand Ballroom Foyer
9:30 - 10:00	Opening remarks <ul style="list-style-type: none">➤ Mr. Burhanettin Aktaş, Deputy Undersecretary of Treasury, Turkey➤ Mr. Rintaro Tamaki, Deputy Secretary-General, OECD
10:00 – 10:30	Special address: The importance of financial literacy and the Turkish Financial Education Plan
Speaker	➤ Dr. Vahdettin Ertaş, Chairman, Capital Markets Board of Turkey
10:30 – 11:00	Coffee break in the Grand Ballroom Foyer
11:00 – 12:45	Roundtable 1: Challenges, solutions and progress in financial education across Europe and in Turkey
Issues	This roundtable will allow an exchange of experience and best practices on financial education and its background in Europe and Turkey focusing on recent progress made and challenges ahead.
Moderator	Mr. André Laboul, Chair of the OECD International Network on Financial Education (INFE)
Presentation	➤ Ms. Chiara Monticone, Policy Analyst, Financial Affairs Division, OECD <i>Survey on Financial Education in Europe</i>
Selected case studies	➤ Mr. Olaf Simonse, Money Wise Platform, Ministry of Finance, Netherlands ➤ Ms. Caroline Rookes, Chief Executive, Money Advice Service, UK ➤ Mr. Bora Oruç, Executive Vice Chairman, Capital Markets Board of Turkey ➤ Ms. Alicia Valencia García, Deputy Director for Financial Support Measures, Ministry of Economy and Competitiveness, Spain
12:45 - 14:00	Lunch hosted by Capital Markets Board of Turkey in the Taksim Ballroom (T floor)
14:00 – 15:45	Roundtable 2: What are the appropriate role(s) of the private and not-for-profit sectors in financial education?
Issues	This roundtable will look at the often controversial role of non-public stakeholders (private and not-for-profit sectors) in financial education. Based on the recent OECD/INFE guidelines on private and not-for-profit sector in financial education, national experiences and the views of concerned stakeholders, the roundtable should provide a platform for an open discussion on this issues and the identification of concrete good practices and way forward.
Moderator	Ms. Anna Zelentsova, Head, Financial Literacy and Financial Education Project, Ministry of Finance, Russian Federation
Presentation	➤ Ms. Flore-Anne Messy, Senior Policy Expert and Executive Secretary of the International Network on Financial Education, OECD <i>OECD/INFE Guidelines for Private and Not-for-profit Stakeholders in Financial Education</i>
Discussants	➤ Ms. Berna Ulman, Regional General Manager, Visa Europe ➤ Mr. Antoni Ballabriga, Head of Corporate Responsibility & Reputation, BBVA, Spain ➤ Mr. Sébastien de Brouwer, Executive Director, European Banking Federation, Belgium ➤ Ms. Sue Lewis, Independent Consultant and Chair of the Financial Services Consumer Panel, UK ➤ Ms. Susana Narciso, Banking Conduct Supervision Department, Central Bank of Portugal

15:45 – 16:15 Coffee break in the Grand Ballroom Foyer

16:15 – 17:30 Special issue: Financial literacy and innovation for young people

Issues To end the day, this special session will explore how the use of innovation and new technologies in different fields, and in particular education, can help to make financial literacy work for young people. The session will open with the views of an educationist on how to best approach financial literacy issues with young people and will then be illustrated by an example of an engaging game designed to promote behavioral changes in young audiences.

Moderator Mr. Lyndwill Clarke, Financial Services Board, South Africa

- Speakers**
- Ms. Diane Fisher-Naylor, Creativity, Culture and Education, UK
 - Ms. Katharina Norden, Co-founder, Three Coins, Austria
Three Coins game: why it works and evaluation

19:00 – 21:00 Gala dinner hosted by the Turkish Authorities at Vera Yildiz Park

Friday, 23 May 2014

08:30 - 9:00 Coffee in the Grand Ballroom Foyer

09:00 – 10:30 **Session 3: The remittance corridor:
The role of financial education in empowering migrant workers and their families**

Issues This session will look at the specific situation of migrant workers with respect to financial literacy. In a world where workers' mobility is increasing within countries and across borders, the related financial flows and remittances are becoming an important policy stake in many countries and globally. This session will discuss, in particular, migrants and their families' needs for financial and economic empowerment and the challenges faced. The session will also address relevant existing financial awareness and education programmes and initiatives in the home and/or host country based on the OECD/INFE survey and concrete country experiences.

Moderator **Mr Miles Larbey, Senior Executive Leader, Australian Securities and Investments Commission**

- Speakers**
- Dr. Camille Busette, Assistant Director, Consumer Financial Protection Bureau, USA
 - Mr. Beniamino Savonitto, Associate Initiative Director, Financial Capability, Global Financial Inclusion Initiative, Innovations for Poverty Action
 - Mr. Adrian Dincsoy, Financial Systems Development, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

10:30 – 11:00 Coffee break in the Grand Ballroom Foyer

11:00 – 13:00 **Session 4: What are the Criteria for Success of Financial Literacy?**

Issues This session will allow a focused discussion on initiatives aimed at creating criteria and standards to define financial literacy levels and identify criteria for success. This will involve a presentation of the revised OECD toolkit on measuring financial literacy as well as work on core competencies on financial literacy for youth in advance of the release of the PISA financial literacy results in July 2014, as well as country case studies which have developed precise criteria for success and core competencies on financial literacy for youth and/or adults.

Moderator **Prof. Annamaria Lusardi, Academic Director, Global Financial Literacy Excellence Center, (GFLEC), USA**

- Speakers**
- Ms. Adele Atkinson, Policy Analyst, Financial Affairs Division, OECD
OECD Toolkit to Measure Financial Literacy and Core Competencies
- Selected case studies**
- Mr David Kneebone, Executive Director, Commission for Financial Literacy & Retirement Income, New Zealand
 - Ms Jane Rooney, Director of Financial Literacy, Financial Consumer Agency of Canada
 - Dr. Marusa Freire, Deputy Head of the Financial Education Department, Central Bank of Brazil

13:00 – 13:15 Closing remarks

- **Mr. Bekir Sıtkı Şafak, Acting Chairman, Capital Markets Board of Turkey**
- **Mr. Rintaro Tamaki, Deputy Secretary-General, OECD**

13:15 - 14:30 Lunch hosted by Capital Markets Board of Turkey in the Taksim Ballroom (T floor)