

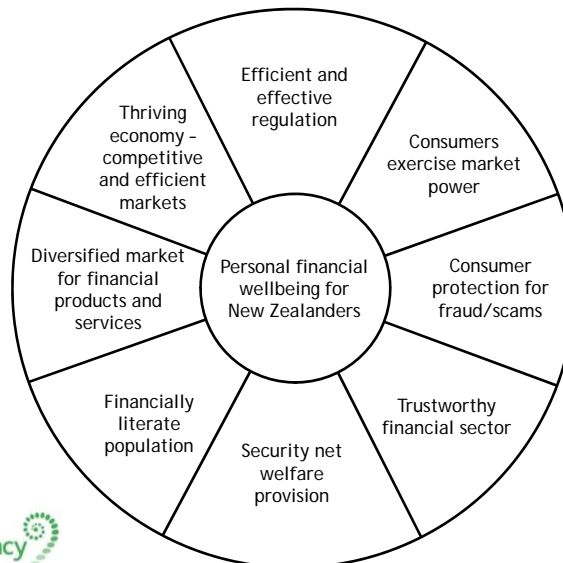
## Investor education - where it fits in New Zealand

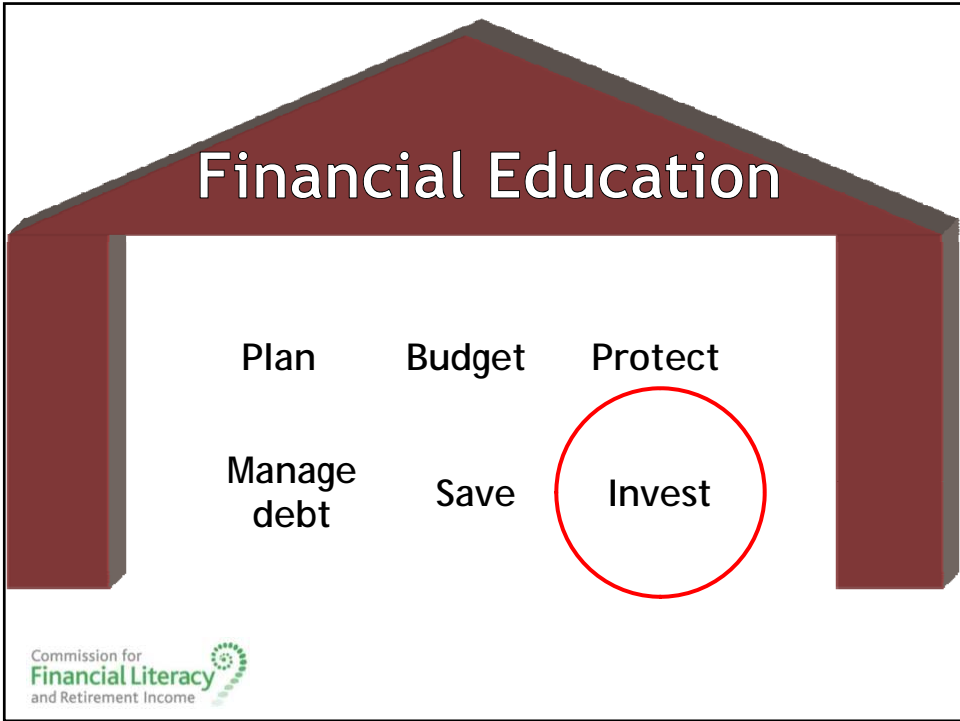



DIANA CROSSAN  
Retirement Commissioner,  
New Zealand

Saturday 4<sup>th</sup> February, 2012  
SEBI-OECD International Conference  
on Investor Education

## Contributors to personal financial wellbeing of New Zealanders








**sorted.org.nz**  
YOUR INDEPENDENT MONEY GUIDE

1. Think, Shrink and Grow
 




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2. Life events
  - *new job*
  - *new house*
  - *new baby*
  - *retirement*

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3. A to Z
  - *information*
  - *calculators*



Commission for  
**Financial Literacy**  
and Retirement Income

# New Zealand National Strategy for Financial Literacy

Vision: Personal financial wellbeing for New Zealanders

Mission: New Zealanders are financially well-educated and can make informed financial decisions throughout their lives

- Developing quality
- Extending delivery
- Monitoring and evaluating
- Working together



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## Developing quality

Your investment profile

Types of investment

Advice information

8 rules for sorted investing

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## Extending Delivery

Financial education  
for specific groups in  
New Zealand



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## Working together



## Sharing what works - evaluation/measurement

### Projects/programmes

- *All programmes should be evaluated*
- *Use OECD guidelines*

### National Strategy

- *It's difficult to evaluate a national strategy*
- *We're working on high level measurements*
  - *four-yearly survey of financial knowledge, behaviour and attitude*

**financialliteracy.org.nz**  
BUILDING FINANCIAL CAPABILITY

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