



Conference

INCREASING FINANCIAL CAPABILITY

March 28, 2007

European Commission Charlemagne building
Rue de la Loi 170, Brussels



AGENDA

08.00 – 09.30 Registration and welcome coffee

09.30 – 09.45

Welcome Address

Ms Pervenche Berès – Chairwoman of the Economic and Financial Committee, **European Parliament**

09.45 – 10.00

Opening Address

Prof Hans-Helmut Kotz – Member of the Executive Board, Deutsche Bundesbank, Germany

10.00 – 11.30

Panel I

Laying the foundations: Financial education of young people

Moderator:

Mr David Wright – Director, Financial Services Policy & Financial Markets, DG Internal Market & Services, European Commission

Speakers:

Mr Shaun Mundy, Financial Services Authority, UK: *Building Financial Capability*

Mr Ottó Gecser, Foundation for Financial Self-reliance, Hungary: *Public Awareness Campaign*

Dott. Massimo Rocca, Italian Banking Association, Italy: *PattiChiari*

Ms Anne-Françoise Lefèvre, European Savings Banks Group, EU: *European Stock Market Training initiative*

Mr Dirk Staudenmayer, DG Health & Consumer Protection, European Commission: *Current EU initiatives on consumer financial education*

11.30 – 13.00

Panel II

Important life events: Forewarned is forearmed

Moderator:

Mr Elemer Tertak – Director, Financial Institutions, DG Internal Market & Services, European Commission

Speakers:

Ms Marloes van den Heijkant, Ministry of Finance, the Netherlands: *Centiq – Platform for Financial Competence*

Mr Rob Goedhart, Consumentenbond (Dutch Consumers' Association), the Netherlands: *Consumers' View of Financial Education*

Prof Udo Reifner, Institute for Financial Services, Germany: *Working to achieve responsible credit*

Ms Dara Duguay, Citigroup, US-EU: *Financial Education Strategy*



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13.00 - 14.30 **Lunch**

14.30 - 16.00 **Panel III**

Looking ahead: Financial education on pensions, investment and long-term savings

Moderator: **Mr André Laboul**, Head of Financial Affairs Division, OECD

Speakers:

Mr Philippe Herzog, Director, Institute for Financial Education of the Public, France: *Developing a national policy on financial education*

Mr Jim Dredge, FSA Workplace Programme Director, Lloyds TSB & Financial Services Authority, UK: *Financial Education in the workplace*

Dr Wilhelm Ruprecht, German Insurance Association, Germany: *Financial education in the field of pensions - the activities of GDV*

Mr Per Karlberg, The Confederation of the Nordic Bank, Finance and Insurance Unions, Sweden: *Financial services industry employees' role in educating and informing consumers*

16.00 – 17.00 **Closing of conference**

Moderator: **Mr Jörgen Holmquist** - Director General, Internal Market and Services, European Commission

16.10 – 16.20 **Closing address**

Ms Meglena Kuneva, EU Consumer Protection Commissioner

16.20 – 16.40 **Keynote speech**

Mr Charlie McCreevy, EU Internal Market Commissioner

16.40 - 17.00 **Conclusions**