



EUROPEAN COMMISSION

Internal Market and Services DG

FINANCIAL SERVICES POLICY AND FINANCIAL MARKETS
Director

Brussels, 04.06.2010

**Agenda of the 4th meeting of the
Expert Group on Financial Education (EGFE)**

Date: 04 June 2010 (10:00-16:15)

Venue: Centre Albert Borschette, **room 2B**
36, rue Froissart; 1049 Bruxelles

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OBJECTIVES OF THE MEETING

- Discuss latest developments in EU policies and initiatives on financial education
- Update on recent developments and initiatives in MS and at global level
- Focus on Financial Education and pensions/savings for retirement

DETAILED AGENDA (10:00-16:15)

1. INTRODUCTION – PROGRESS IN EU POLICIES AND INITIATIVES (10:00-10:45)

- Presentation of EU recent initiatives and forthcoming policies (M.Merlin, F. Fiorello, and J. Stankovic-Banka). J. Stankovic will speak about DOLCETA (see **annex 2**)
- Exchange of views

2. MAIN EVENTS AND DEVELOPMENTS IN MEMBER STATES AND AT GLOBAL LEVEL (10:45 -12:15)

- Update on the main developments in Member States, in particular as regards national strategies (tour de table)
- M. Weigl (EGFE) – The Austrian initiative on the development of a concept of a 'driving licence' on financial education
- F. Messy (OECD) - Main events at global level with particular focus on the next INFE meeting on and the OECD-Bank of Italy Symposium on Financial Literacy in Rome on 8-9 June 2010 (see **annex 3**)
- A Aprahamian (World Bank) – Consumer Protection and Financial Literacy: Lessons from Nine Country Studies (see **annex 4**)
- Exchange of views

3. FOCUS ON FINANCIAL EDUCATION AND PENSIONS/SAVINGS FOR RETIREMENT (12:15-12:45)

- F. Messy (OECD) – Improving financial education and awareness on private pensions (see **annex 3**)
- Exchange of views

LUNCH BREAK (12:45-14:00)

4. FOCUS ON FINANCIAL EDUCATION AND PENSIONS/SAVINGS FOR RETIREMENT - CONTINUATION (14:00-16:00)

- W. Ruprecht (EGFE) – Financial Education in the field of pensions (see **annex 5**)
- V. Nye (EGFE) – Financial Education and pensions: the UK experience (see **annex 6**)

- A. Seiersen (EGFE) - Pensions, financial literacy & motivation (see **annex 7**)
- Exchange of views

5. CONCLUSION (16:00-16:15)

- Summary of the discussions and follow-up to the meeting. Date and topic for the next meeting