

2012 National Financial Capability Study – Release of State-by-State Findings



Wednesday, May 29, 2013

10:30 a.m. – 12:30 p.m.

Global Financial Literacy Excellence Center

George Washington University School of Business

Agenda

- 10:30 *Welcome*
Doug Guthrie, Dean of the George Washington University School of Business
- 10:35 *2012 National Financial Capability Study*
Rick Ketchum, Chairman and CEO of FINRA and Chairman of the FINRA Foundation
- 10:45 *Financial Capability and Investing*
Mary Jo White, Chair, U.S. Securities and Exchange Commission
- 10:55 *Financial Capability and the Young*
Cyrus Amir-Mokri, Assistant Secretary for Financial Institutions, U.S. Department of the Treasury
- 11:05 *The CFPB and Financial Education*
Richard Cordray, Director, Consumer Financial Protection Bureau
- 11:15 *Collective Action and Community Impact*
Stacey Stewart, U.S. President, United Way Worldwide
- 11:30 *Panel: A Discussion of Financial Capability and Findings from the 2012 NFCS*
Moderator: Gerri Walsh, President, FINRA Investor Education Foundation
Panelists:
- Chris Bumcrot, Founder and President, Applied Research and Consulting LLC
 - Gail Hillebrand, Associate Director, Consumer Financial Protection Bureau
 - Melissa Koide, Deputy Assistant Secretary for Consumer Policy, U.S. Department of the Treasury
 - Annamaria Lusardi, Academic Director, Global Financial Literacy Excellence Center, George Washington University School of Business
- 12:20 *Closing Remarks*
Gerri Walsh, President, FINRA Investor Education Foundation