



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

Tuesday, July 12, 2016
3:30 p.m. – 5:00 p.m., reception to follow
George Washington University
Jack Morton Auditorium
#FinCap2016

Agenda

Introductory Video

How Are Americans Faring with Their Finances?

Welcome

Geraldine M. Walsh, President, FINRA Investor Education Foundation

Annamaria Lusardi, Academic Director, Global Financial Literacy Excellence Center

Richard G. Ketchum, Chairman and CEO, FINRA and Chairman, FINRA Foundation

Sarah Bloom Raskin, Deputy Secretary, U.S. Department of the Treasury

Mary Jo White, Chair, U.S. Securities and Exchange Commission

Richard Cordray, Director, Consumer Financial Protection Bureau

Jane Rooney, Financial Literacy Leader, Financial Consumer Agency of Canada

Panel: Digging Deep with the NFCS

Moderator: Chris Bumcrot, Principal and Owner, ARC Research

Panelists:

- Signe-Mary McKernan, Senior Fellow and Director, Opportunity and Ownership Initiative, Urban Institute
- Sarah Dewees, Senior Director of Research, Policy, and Asset Building Programs, First Nations Development Institute
- Michael Morris, Executive Director, National Disability Institute
- Daniel Pollard, Senior Advisor, Enterprise Data, Office of Federal Student Aid, U.S. Department of Education
- Steve Trites, Manager of Research and Policy, Financial Consumer Agency of Canada

Closing Remarks

Annamaria Lusardi, Academic Director, Global Financial Literacy Excellence Center

Geraldine M. Walsh, President, FINRA Investor Education Foundation

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