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GFLEC
GLOBAL FINANCIAL LITERACY
EXCELLENCE CENTER

FinLit news

WINTER 2016
NEWSLETTER



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Dear Colleagues and Friends,

As this year draws to a close, we would like to share with you our latest news and some of our plans for 2017.

In the past year we have completed numerous research projects, participated in the release of groundbreaking data on financial capability, launched a new workplace financial wellness initiative, and developed teaching resources. Internally, we have strengthened our Board of Advisors and brought in new staff members and consultants.

We have a number of projects for the new year, including work on financial fragility, financial fraud, and financial education about risk and risk diversification. Additionally, this spring we will co-host our 4th Global Policy Research Symposium to Advance Financial Literacy with the Organisation for Economic Cooperation and Development (OECD) in Paris, France.

We are grateful to those of you who have supported our work, and we hope that, as you plan your charitable giving, you will consider supporting our multifaceted efforts to promote financial literacy around the world. Your support would help further increase our impact on research, policy, and programs. You can donate to GFLEC by clicking [here](#).

Please enjoy reading more about GFLEC's activities. Our team and I wish you a healthy and prosperous new year. Happy holidays!

Warm regards,

Annamaria Lusardi
Founder & Academic Director, GFLEC

Entrepreneurship among Baby Boomers Conference

Research: Entrepreneurship among Baby Boomers

Our conference on entrepreneurship among baby boomers, held Nov. 2, 2016, featured GFLEC's new [research](#) on this topic. With the support of the Kauffman Foundation, GFLEC convened experts to explore research on late-life entrepreneurship and its implications for policy and programs.



Lusardi Discusses Student Loans on CBS Evening News

The student loan crisis is spreading and deepening, and Director Lusardi recently [appeared on CBS Evening News with Scott Pelley](#) to discuss our new policy brief on student loan debt. GFLEC continues its efforts to promote financial literacy among young people.

GFLEC HAPPENINGS



GFLEC's Board of Advisors

Our 2017 Board of Advisors will be chaired by Diana Crossan, former retirement commissioner for New Zealand. The Board members bring a range of expertise from the corporate, academic, nonprofit, and government sectors. Visit the [webpage](#) to learn more about the members of GFLEC's Board of Advisors.

3rd Cherry Blossom Financial Education Institute

Our third annual Cherry Blossom Financial Education Institute will take place in April 2017. This event, sponsored by the National Endowment for Financial Education, is attended by top researchers in financial literacy and financial education from around the world. We invite submissions of abstracts or papers. Learn more [here](#).





New Partnership with Allianz

[Allianz](#) and GFLEC partnered to conduct one of the largest studies on financial and risk literacy in Western Europe. Director Lusardi shared her expertise in the design and structure of the study's questionnaire. To date, 10,000 individuals in major European countries have been interviewed. The results of the survey will be released in January 2017.

GFLEC Work Presented at Financial Wellness Seminar

Director Lusardi spoke at the Conference Board's Employee Financial Wellness Seminar on Nov. 29, 2016, in NYC. She discussed GFLEC's research and programs in [workplace financial wellness](#), a topic that has become one of our key focus areas. Executives from Cisco Systems, Disney, Major League Baseball, and SunTrust also spoke at the seminar.



New Webpage Features GFLEC Research on NFCS Data

GFLEC has done extensive research on the three waves of the groundbreaking National Financial Capability Study (NFCS). The Center recently created a [webpage](#) that provides access to our findings, including working papers, policy briefs, infographics, and a link to the full study, commissioned by the FINRA Investor Education Foundation.

De Bassa Joins Panel at Canada's National Research Symposium

Senior Research Associate Carlo de Bassa joined a panel at the [National Research Symposium on Financial Literacy](#) organized by the Financial Consumer Agency of Canada on Nov. 16, 2016. He discussed financial fragility in the United States. Other panelists included representatives from the FINRA Foundation and the CFPB.





GFLEC Participates in FinEd Conferences in Rio de Janeiro

Director Lusardi delivered a keynote address to regulators from around the globe at the OECD and Brazilian Securities and Exchange Commission (CVM)'s [Seminar on Emerging Trends in Financial Education](#) on Dec. 9, 2016. The previous day, she discussed the National Financial Capability Study at CVM's Behavioural Sciences and Investor Education Conference.

CFPB/OECD Event Features Lusardi as Keynote Speaker

Director Lusardi served as the keynote speaker at the CFPB/OECD workshop *Research and Capacity Building for Consumer Financial Protection: An Exchange between Regulators in Washington, DC*, on Dec. 14, 2016. She shared key findings from the [NFCS](#), [PISA](#), and the [Global Financial Literacy Survey](#) with international regulators.



Lusardi Delivers Keynote Address at AFCPE Symposium

Director Lusardi spoke to approximately 600 financial counselors and industry professionals at the AFCPE Annual Research & Training Symposium in Louisville, Kentucky on Nov. 16, 2016. She presented new findings from our research on Americans' financial capability.

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