

High-level Global Symposium

**Implementing effective financial  
literacy policies in a changing  
financial landscape**

**DRAFT AGENDA**

**8-9 November 2017  
New Delhi, India**



The contribution of the OECD is sponsored  
by the Japanese Government



**भारतीय रिज़र्व बैंक**  
**Reserve Bank of India**  
India's Central Bank

## ■ About the OECD

The OECD is a forum in which governments compare and exchange policy experiences, identify good practices in light of emerging challenges, and promote decisions and recommendations to produce better policies for better lives. The OECD's mission is to promote policies that improve the economic and social well-being of people around the world.

## ■ About the OECD International Network on Financial Education (INFE)

Created in 2008, the OECD/INFE promotes and facilitates international co-operation between policy makers and other stakeholders on financial education issues worldwide. More than 230 public institutions from over 100 countries have joined the OECD/INFE. [www.financial-education.org](http://www.financial-education.org)

## ■ About the Reserve Bank of India

Established on 1 April 1935, Reserve Bank of India, India's central bank, functions as the monetary authority of the country, regulator and supervisor of the banking system and acts as the banker to the Government and to the banks. It also acts as the regulator of the payment and settlement systems, manager of foreign exchange and issuer of currency. RBI also has a developmental role to expand access to affordable financial services and promote financial literacy and consumer protection.

## ■ Contact

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*Reserve Bank of India*

To live tweet the Symposium, use the hashtag **#OECDfe**

# Day 1 – 8 November

08:15 – 09:20 Registration

09:20 – 09:40 Welcome and opening remarks

- **B. P. Kanungo**, Deputy Governor, Reserve Bank of India
- **Flore-Anne Messy**, Head of the Financial Affairs Division, Directorate for Financial and Enterprise Affairs, OECD; and Executive Secretary of the OECD/INFE

09:40 – 10:50 Session 1.1: Financial literacy in the digital age

Technology permeates each and every part of our lives, both personal and professional, creating value and transforming our way of doing things. Despite the challenges and risks in a digital landscape, to make financial products and services accessible, affordable and cost efficient, going digital is not an alternative but a necessity. This session will explore the importance of financial literacy in the digital age.

#### Keynote addresses

- **Ajay Bhushan Pandey**, Chief Executive Officer of the Unique Identification Authority of India (UIDAI)
- **Diego Lombardo**, Senior Analyst, Ministry of Treasury and Public Finance, Argentina (TBC)

#### Moderator

**Flore-Anne Messy**, Head of the Financial Affairs Division, OECD; and Executive Secretary of the OECD/INFE

#### In the chair

- **Shahariah Othman**, Director of Consumer and Market Conduct Department, Bank Negara Malaysia
- **Diane Maxwell**, Retirement Commissioner, Commission for Financial Capability, New Zealand

10:50 – 11:30 Break with poster presentations

11:30 – 12:50

## Session 1.2: Multi-stakeholder support for financial education

Many stakeholders are concerned about the low levels of financial literacy among the populations they work with. This session shows how they are applying practical approaches to make a real and lasting difference.

*Policy discussion: the role of regulators – Indian case studies*

### Moderator

**S.S. Mundra**, former Deputy Governor, Reserve Bank of India

### Panellists

- **Surekha Marandi**, Executive Director, Reserve Bank of India
- **Nagendraa Parakh**, Executive Director, Securities and Exchange Board of India
- **M. Pulla Rao**, Executive Director, Insurance Regulatory and Development Authority
- **Anant Gopal Das**, Chief General Manager, Pension Fund Regulatory & Development Authority

*Experience from the ground: Presentations from diverse stakeholders*

### Speakers

- **Ramraj Pai**, President, CRISIL Foundation, India
- **Yousra Hamed**, Technical Expert, Social Finance Program, Enterprises Department, International Labour Organization
- **Natalia Lozitskaya**, Financial Literacy and Communications Director, USAID Financial Sector Transformation Project, Ukraine

12:50 – 13:50

Lunch

13:50 – 15:00

### Session 1.3: Financial literacy in Asia – data, policies and practices

This session will present insights from financial literacy surveys in the region and discuss what these mean for policy and practice

#### *Experiences from across Asia*

#### Moderator

**Adele Atkinson**, Senior Policy Analyst, OECD

#### Speakers

- **Uma Shankar**, Principal Chief General Manager, Reserve Bank of India
- **Sarjito**, Deputy Commissioner in Financial Education and Consumer Protection, Financial Services Authority, Indonesia
- **Johnny Noe E. Ravalo**, Assistant Governor for the Office of Systemic Risk Management, Bangko Sentral ng Pilipinas.

15:00 – 15:30

Break

15:30 – 17:00

### Session 1.4: Implementing and evaluating national strategies - what have we learnt?

Speakers will present and discuss the challenges faced and solutions found when implementing a national strategy for financial education, and describe effective ways of evaluating the success of the strategy.

#### Keynote address

**Sandip Ghose**, Director, National Institute of Securities Markets, India

#### Moderator

**Jonathan Hollow**, Head of Corporate Strategy and Innovation, Money Advice Service, United Kingdom

#### Panellists

- **Armenuhi Mkrtchyan**, Head of Consumer Rights Protection and Financial Education Center, Central Bank of Armenia
- **Maria Lúcia Leitão**, Head of Banking Conduct Supervision Banco de Portugal
- **João Evangelista de Sousa Filho**, Senior Analyst, Department for Financial Citizenship, Banco Central do Brasil
- **Yolanda Cue**, Deputy Director General for Financial Inclusion, BANSEFI, Mexico

17:00 – 17:30

In the spotlight

*Women and financial literacy - Today and Tomorrow*

**Usha Thorat**, Former Deputy Governor, Reserve Bank of India

19:00 – 21:00

**Dinner** hosted by the Reserve Bank of India, Leela Ambience Convention Hotel

## Day 2 – 9 November 2017

09:30 – 09:40

### Welcome and day 1 highlights

**Flore-Anne Messy**, Head of the Financial Affairs Division, OECD; and Executive Secretary of the OECD/INFE

09:40 - 10:25

### In the spotlight

#### *New research findings on financial education and financial literacy*

**Ms Ruchika Singh**, Senior Policy Manager and Finance Sector Lead, JPAL South Asia

#### *Designing scalable and sustainable financial education interventions – Train the trainers, peer learning and self-guided learning*

**Uma Shankar**, Principal Chief General Manager, Reserve Bank of India

10:25 – 11:10

### Session 2.1: Tailoring delivery to target audiences in the digital age

The digital age provides new opportunities but has also introduced new challenges. This session will describe various approaches to delivering financial education that take into account the role of digitalisation

#### *Financial education for school children and youth*

**David Boyle**, General Manager, Investor Education, Commission for Financial Capability, New Zealand

#### *Financial education in the workplace*

**Jérémie Ryan**, Director, Financial Literacy and Stakeholder Engagement, Financial Consumer Agency of Canada

#### *Financial literacy for older generations in the digital age*

**Sandra Boyd-Hoare**, Senior Policy Officer, Australian Securities and Investments Commission

11:10 – 11:30

### Break

11:30 – 12:45

## Session 2.2: Supporting safe investment through financial education

This session will provide an opportunity to learn how countries are implementing the OECD/INFE Policy Framework for Investor Education

### Moderator

**Olaf Simonse**, Money Wise Platform, Ministry of Finance, the Netherlands

### Panellists

- **David Kneebone**, General Manager, Investor Education Centre, Hong Kong, China
- **Lyndwill Clarke**, Head of Consumer Education, Financial Services Board, South Africa
- **Nagendraa Parakh**, Executive Director, Securities and Exchange Board of India
- **Pasquale Munafò**, Securities and Exchange Commission (CONSOB), Italy

12:45 – 13:00

## Closing Remarks

- **Sonali Sengupta**, General Manager, Reserve Bank of India
- **Flore-Anne Messy**, Head of the Financial Affairs Division, OECD; and Executive Secretary of the OECD/INFE

13:00 – 13:45

## Lunch