

# OECD/CVM Centre on Financial Education and Literacy in Latin America and the Caribbean

## 4<sup>th</sup> Meeting of the OECD/INFE LAC Regional Network

### Supporting individuals and MSMEs in emerging from the Covid-19 crisis

#### AGENDA

17 December 2020

08h00 – 10h30 Mexico

09h00 – 11h30 Colombia, Peru

11h00 – 13h30 Brazil, Argentina, Chile

15h00 – 17h30 Paris

OECD Zoom platform

Simultaneous interpretation in English, Spanish and Portuguese



## ■ About the OECD/CVM Centre on Financial Education and Literacy in Latin America and the Caribbean

The OECD/CVM Centre on Financial Education and Literacy in Latin America and the Caribbean (LAC) promotes efficient financial education in LAC through a range of activities including meetings, surveys, mutual learning through peer reviews, and research. Launched in 2016, the Centre is a joint undertaking by the OECD and the Securities and Exchange Commission of Brazil (CVM).

The Centre, based in Rio de Janeiro, Brazil, is a knowledge exchange hub on efficient financial education and related issues such as financial consumer protection, in Brazil and throughout the region. Its activities build on the work of the OECD International Network on Financial Education (INFE) and include methodologies for collecting qualitative and quantitative data, policy analysis, instruments, and research.

Under the aegis of the Centre and of the OECD/INFE, an OECD/INFE LAC Regional Network has been created to support LAC members of the OECD/INFE in designing and implementing their financial education policies and programmes. The OECD/INFE LAC Regional Network meets once a year in the margins of the annual meeting of the OECD/CVM Centre. Currently, 51 public authorities (central banks, financial markets authorities, ministries of finance, social policy and education) from 22 LAC countries are members of the regional network.

Consult the list of members of the OECD/INFE from LAC here:  
<http://www.oecd.org/daf/fin/financial-education/INFE-member-lists-LAC.pdf>

## ■ Contact

*OECD CVM Centre*

Mr. Andrea Grifoni [andrea.grifoni@oecd.org](mailto:andrea.grifoni@oecd.org) | [lacfecentre@oecd.org](mailto:lacfecentre@oecd.org)

Mr. Jonathan Vidal [jonathan.vidal@cvm.gov.br](mailto:jonathan.vidal@cvm.gov.br)

The meeting will be conducted in English, Spanish and Portuguese with simultaneous interpretation.

**Thursday 17 December** (times are indicated as BRT, Rio de Janeiro)

Event open to members of the OECD/INFE LAC Regional Network and to members of the OECD/INFE Research Committee from LAC.

The meeting will be conducted with simultaneous interpretation in English, Spanish and Portuguese.

11h00 BRT	<b>Opening remarks</b>
	<ul style="list-style-type: none"><li>• <b>Flore-Anne Messy</b>, Head of the Insurance, Private Pensions and Financial Markets Division, OECD and Executive Secretary of the OECD/INFE</li><li>• <b>Marcelo Barbosa</b>, Chair, Securities and Exchange Commission of Brazil CVM</li><li>• <b>Carlos Marcio Cozendey</b>, Ambassador, Brazilian Representative to the OECD</li><li>• <b>Felipe Paiva</b>, Director, B3</li><li>• <b>Ana Leoni</b>, Superintendent of Financial Education and Market Data, ANBIMA</li></ul>
11h20 BRT	<b>The OECD Recommendation on Financial Literacy</b>
<b>Speaker</b>	<ul style="list-style-type: none"><li>• <b>Andrea Grifoni</b>, Policy Research and Advice, OECD/CVM Centre</li></ul> <p>Members will be presented the OECD Recommendation on Financial Literacy recently adopted by OECD governments (including Chile, Colombia, Mexico and to which Brazil has officially adhered)</p>
<b>Reference documents</b>	<p>2020 OECD Recommendation on Financial Literacy [<a href="#">EN</a>   <a href="#">ES</a>   <a href="#">PT</a>   <a href="#">FR</a>]</p> <p>Informe OCDE CAF Estrategias nacionales de inclusión y educación financiera en América Latina y el Caribe: retos de implementación [<a href="#">ES</a>]</p>
11h45 BRT	<b>The impact of Covid-19 on individuals' financial resilience in LAC: current policy response and next priorities</b>
<b>Moderator</b>	<b>José Vasco</b> , Director, Office of Investor Protection and Assistance, CVM
<b>Speakers</b>	<ul style="list-style-type: none"><li>• <b>Diana Mejia</b>, Financial Inclusion and Financial Education Specialist, Development Bank of Latin America (CAF)</li><li>• <b>Maria Jose Roa</b>, Financial Well-being/Financial Inclusion/Financial Education/ Researcher, Member of the OECD/INFE Research Committee, Mexico</li><li>• <b>Vera Rita de Mello Ferreira</b>, Vértice Psi – Instituto de Psicologia Econômica e Ciências Comportamentais, Member of the OECD/INFE Research Committee, Brazil</li><li>• <b>Chiara Monticone</b>, Senior Policy Analyst, OECD</li></ul>

12h25 BRT **Roundtable**

<b>Moderator</b>	<b>Josè Vasco</b> , CVM Members of the LAC Regional Network will be invited to briefly present: <ul style="list-style-type: none"><li>• Financial education measures implemented as a response to the Covid-19 crisis, focusing in particular on their effectiveness and on the challenges they are facing.</li><li>• Priorities for the short and medium term to facilitate the post Covid-19 recovery.</li></ul>
<b>Reference documents</b>	Financial education responses to the Covid-19 crisis <a href="#">[EN]</a> OECD Covid-19 Hub <a href="#">[EN   ES   PT   FR ]</a> OECD/INFE Survey Instrument to Measure the Financial Literacy of MSMEs <a href="#">[EN]</a>

13h20 BRT **Follow up work**

<b>Moderator</b>	<b>Andrea Grifoni</b> , OECD
<b>Objectives</b>	Members of the LAC Regional Network will be invited to provide input to the programme of work of the OECD/CMV Centre for the next biennium. <ul style="list-style-type: none"><li>• Research focused on LAC</li><li>• Global Money Week 2021 <a href="#">[EN]</a></li><li>• Organisation of webinar and events</li><li>• Governance</li></ul> Members will be invited to provide input also via written process <u>by 23 January</u> .

13h30 BRT **Concluding remarks and next steps**

**MEMBERS OF THE OECD INTERNATIONAL NETWORK ON FINANCIAL EDUCATION  
FROM LATIN AMERICA AND THE CARIBBEAN**

**OECD/INFE full member institutions**

Brazil	<ul style="list-style-type: none"><li>• Banco Central do Brasil</li><li>• Securities and Exchange Commission (CVM)</li></ul>
Chile	<ul style="list-style-type: none"><li>• Comisión para el Mercado Financiero</li></ul>
Guatemala	<ul style="list-style-type: none"><li>• Superintendencia de Bancos of Guatemala</li></ul>
Haiti	<ul style="list-style-type: none"><li>• Ministry of Economy and Finance</li><li>• Bank of the Republic of Haiti</li></ul>
Honduras	<ul style="list-style-type: none"><li>• Comisión Nacional de Bancos y Seguros</li></ul>
Mexico	<ul style="list-style-type: none"><li>• Banco del Bienestar (formerly BANSEFI)</li><li>• Banco de México</li><li>• Ministry of Finance and Public Credit of Mexico</li><li>• National Commission for the Protection of Users of Financial Services (CONDUSEF)</li></ul>
Peru	<ul style="list-style-type: none"><li>• Superintendency of Banks, Insurance and Private Pensions</li></ul>

**OECD/INFE full associate member**

Development Bank of Latin America (CAF)

**OECD/INFE regular member institutions**

Argentina	<ul style="list-style-type: none"><li>• Central Bank of the Republic of Argentina</li><li>• Comisión Nacional de Valores</li></ul>
Aruba	<ul style="list-style-type: none"><li>• Central Bank of Aruba</li></ul>
Brazil	<ul style="list-style-type: none"><li>• Ministry of Education</li><li>• National Secretariat for Consumer Protection (SENACON), Ministry of Justice</li><li>• National Secretariat for Pension Funds, Ministry of Social Security</li><li>• National Superintendence of Complementary Pensions (PREVIC)</li><li>• Previdencia - Secretariat of Policies for Pension Funds</li><li>• Superintendence of Private Insurance (SUSEP)</li></ul>
British Virgin Islands	<ul style="list-style-type: none"><li>• Financial Services Commission</li></ul>

Chile	<ul style="list-style-type: none"> <li>• Central Bank of Chile</li> <li>• Ministry of Finance of Chile</li> <li>• Servicio Nacional del Consumidor (SERNAC), Ministry of Economy, Development and Tourism</li> </ul>
Colombia	<ul style="list-style-type: none"> <li>• Banco de la República</li> <li>• Banco de la Oportunidades</li> <li>• Fondo de Garantías de Instituciones Financieras (FOGAFIN)</li> <li>• Ministry of National Education</li> <li>• Superintendencia Financiera de Colombia</li> </ul>
Costa Rica	<ul style="list-style-type: none"> <li>• Superintendencia General de Valores (SUGEVAL)</li> </ul>
Dominican Republic	<ul style="list-style-type: none"> <li>• Superintendence of Banks</li> <li>• Securities Superintendence</li> </ul>
Ecuador	<ul style="list-style-type: none"> <li>• Superintendencia de Compañías y Valores</li> <li>• Superintendencia de Bancos del Ecuador</li> <li>• Superintendencia de Economía Popular y Solidaria</li> </ul>
Jamaica	<ul style="list-style-type: none"> <li>• Financial Services Commission</li> </ul>
Mexico	<ul style="list-style-type: none"> <li>• National Insurance and Bond Commission (CNSF)</li> <li>• National Commission for the Retirement Savings System (CONSAR)</li> <li>• National Banking and Securities Commission (CNBV)</li> </ul>
Nicaragua	<ul style="list-style-type: none"> <li>• Superintendencia de Bancos y de Otras Instituciones Financieras</li> </ul>
Panama	<ul style="list-style-type: none"> <li>• Ministry of Economy and Finance</li> </ul>
Paraguay	<ul style="list-style-type: none"> <li>• Banco Central del Paraguay</li> <li>• Comisión Nacional de Valores</li> <li>• Ministry of Finance</li> </ul>
Suriname	<ul style="list-style-type: none"> <li>• Central Bank of Suriname</li> </ul>
Trinidad and Tobago	<ul style="list-style-type: none"> <li>• Central Bank of Trinidad and Tobago</li> <li>• Securities and Exchange Commission</li> </ul>
Uruguay	<ul style="list-style-type: none"> <li>• Banco Central del Uruguay</li> </ul>
Venezuela	<ul style="list-style-type: none"> <li>• Banco Central de Venezuela</li> </ul>