



AGENDA

President's Advisory Council on Financial Capability Webcast July 12, 2011 – 2:30 p.m. – 4:00 p.m. (EST)

Welcome & Meeting Overview

Josh Wright (Moderator)
Acting Director, Office of Financial Education and Financial Access
U.S. Department of the Treasury

Council Overview

John W. Rogers, Jr.
Chairman, CEO and Chief Investment Officer, Ariel Investments
Chair of the President's Advisory Council on Financial Capability

Subcommittee Updates

Arty Arteaga, Financial Access Subcommittee Chair
Amy Rosen, Youth Subcommittee Chair
Ted Beck, Research Subcommittee Chair
Carrie Schwab-Pomerantz, Partnerships Subcommittee Chair

Guest Speakers

Dr. Mike Staten, Professor and Director, Take Charge America Institute
Norton School of Family and Consumer Sciences, University of Arizona
Discussing financial capability and evaluation with a focus on youth.

Dr. Annamaria Lusardi, Professor of Economics and Accountancy, The George Washington University
School of Business, and Director of the Financial Literacy Center

Dr. Punam Keller, Professor of Management, Tuck School of Business, Dartmouth College
Discussing workplace financial capability

Other Business/Conclusion

John W. Rogers, Jr.
Chairman, CEO and Chief Investment Officer, Ariel Investments
Chair of the President's Advisory Council on Financial Capability

Josh Wright
Acting Director, Office of Financial Education and Financial Access
U.S. Department of the Treasury