



Agenda

Financial Literacy and Education Commission
Public Meeting
June 29, 2016 9:00 a.m. - 11:30 a.m.
U.S. Department of the Treasury, Cash Room

Opening Remarks

- Melissa Koide, Deputy Assistant Secretary for Consumer Policy, U.S. Department of the Treasury
- Jacob J. Lew, U.S. Secretary of the Treasury, Chair of the Commission
- Thomas E. Perez, U.S. Secretary of Labor
- Richard Cordray, Director, Consumer Financial Protection Bureau, Vice Chair of the Commission

Panel: Financial Education and Retirement Investment Advice

- Moderator: Phyllis Borzi, Assistant Secretary of Labor of the Employee Benefits Security Administration, U.S. Department of Labor
- Marilyn Mohrman-Gillis, Executive Director, Center for Financial Planning and Managing Director, Public Policy & Communications, CFP Board
- Sarah Newcomb, Behavioral Economist, Morningstar
- Jon Stein, Founder and CEO, Betterment

Panel: Legal Aid and Financial Education

- Moderator: Karen Lash, Executive Director, White House Legal Aid Interagency Roundtable
- Mary Griffin, Senior Advisor, Office of Financial Empowerment, Consumer Financial Protection Bureau
- Monica Vaca, Assistant Director, Bureau of Consumer Protection, Federal Trade Commission
- Michael Froehlich, Managing Attorney, Community Legal Service of Philadelphia

National Strategy Update