



*\*News Media Advisory and Daybook Item for 5 June, 2017\**

## **GLOBAL INVESTOR EDUCATION CONFERENCE DRAWS EXPERTS TO RIO TO FOCUS ON CHALLENGES OF CHANGING TIMES**

*Joint IFIE-IOSCO Conference, Hosted by ANBIMA, Features Diverse Crowd and Dynamic Programming*

**RIO DE JANEIRO, BRAZIL** – IFIE (The International Forum for Investor Education) and IOSCO (The International Organization of Securities Commissions) are partnering for their 9<sup>th</sup> annual event, titled “A Changing Era in Financial Capability/Investor Education Programming.” The Brazilian Financial and Capital Markets Association (ANBIMA) is hosting this year’s IFIE-IOSCO Global Investor Education Conference in Rio de Janeiro, 4-6 June 2017.

**WHAT:** This year’s Conference focuses on key trends such as demographic cohort challenges and the development of financial technologies (fintech) that significantly impact the implementation of financial capability and investor education strategies and programmes. Case studies, panels, roundtables, breakout discussions, and skill-building and problem-solving sessions will address challenges in Growth and Emerging Market (GEM) jurisdictions as well as in Advanced markets.

For more information, visit [www.ifie.org/2017conference](http://www.ifie.org/2017conference).

**WHO:** Participating experts include:

- Paul Andrews, Secretary General, International Organization of Securities Commissions (IOSCO) & Immediate Past Chair, International Forum for Investor Education (IFIE)
- Ruth Benjamin-Swales, CEO, Association for Savings and Investment of South Africa (ASISA)
- Alparslan Budak, Chair, IFIE; Vice Chairman, Financial Planning Association of Turkey (FPD)
- Suzan Campbell, Senior Manager, Financial Capability, Australian Securities and Investment Commission (ASIC)
- Cristina Carrillo, Founder, Addkeen Consulting
- Len Costa, Partner, RooneyPartners
- Cecile De Wit, Advisor, Education and Training Policy and Programs, International Organization of Securities Commissions (IOSCO)
- José Carlos Doherty, General Superintendent, Brazilian Financial and Capital Markets Association (ANBIMA)
- Ric Edelman, Host, The Ric Edelman Show, #1 New York Times bestselling author
- Kathryn Edmundson, Executive Director for the Secretariat, International Forum for Investor Education (IFIE)
- Tyler Fleming, Director of the Investor Office, Ontario Securities Commission (OSC)
- Claudia Forte, Supervisor, Association of Financial Education in Brazil (AEF Brasil)
- Esther Gitonga, Officer, Capital Markets Authority (CMA) Kenya
- Koichi Ishikura, Director & Chief Officer for International Affairs and Research, Japan Securities Dealers Association (JSDA)
- David Kneebone, General Manager, Investor Education Centre, Hong Kong
- Ana Leoni, Head of Education, Brazilian Financial and Capital Markets Association (ANBIMA) & Secretary-Treasurer, International Forum for Investor Education (IFIE)
- Noel Maye, Chief Executive Officer, Financial Planning Standards Board Ltd.
- Douglas Melville, Principal Ombudsman and Chief Executive, Channel Islands Financial Ombudsman (CIFO)
- Fumiaki Miyahara, Senior General Manager, International Affairs Division and Research Division, Japan Securities Dealers Association (JSDA)
- Lawrence Mumina, Senior Investigations Officer, Capital Markets Authority (CMA) Kenya
- Janete Nel, Marketing Manager and Point Person on the ASISA Consumer Financial Education Standing Committee, The Association for Savings and Investment South Africa (ASISA)



- Leonardo P. Gomes Pereira, Chairman, Securities and Exchange Commission (CVM), Brazil
- Daniel Pfannemüller, Associate Director, B3
- Lori Schock, Director, Office of Investor Education and Advocacy, U.S. Securities and Exchange Commission (SEC)
- Kusumaningtuti Soetiono, Member, Board of Commissioners, Indonesia Financial Services Authority
- Robert Stammers, Director of Investor Education, CFA Institute
- Arlene Stephen, Director, Corporate Communications, Education and Information Division, Trinidad and Tobago Securities and Exchange Commission
- Robert van Dijk, CEO, Brazilian Financial and Capital Markets Association (ANBIMA)
- José Alexandre Cavalcanti Vasco, Director, Office of Investor Protection and Assistance, Securities and Exchange Commission (CVM), Brazil
- Gerri Walsh, Senior Vice President, Financial Industry Regulatory Authority (FINRA) U.S. & President, FINRA Foundation
- Ed Weinstein, President, The Brondesbury Group

**WHEN:** Sunday, 4 June 2017 – Tuesday, 6 June 2017

**WHERE:** The Rio Othon Palace Hotel  
Av. Atlântica, 3264 - Copacabana, Rio de Janeiro - RJ, Brazil

The 2017 IFIE-IOSCO conference is sponsored by FINRA (United States), CFA Institute (worldwide), ANBIMA (Brazil), and JSDA (Japan).

### **ABOUT THE GROUPS**

**IFIE** - The International Forum for Investor Education (IFIE) is the only global organization solely focused on developing and strengthening multi-sector resources toward implementation of Financial Capability/Investor Education programmes and initiatives worldwide. IFIE networks with multi-sector stakeholder organization members and partners within and across jurisdictions; engages multi-sector expertise across the continuum of the financial capability/investor education substantive agenda; shares FC/IE strategies, content and best practices developed worldwide; conducts problem-solving and capacity/infrastructure-building, implementation-oriented virtual and face-to-face programming and working groups; collaborates on FC/IE initiatives with other global entities such as IOSCO and The Organisation for Economic Co-operation and Development (OECD); strengthens the IFIE Global-Regional Chapter Network — in Asia, the Americas, Middle East North Africa (Europe and Africa in development) — by providing focused, accessible and regionally relevant activities, problem-solving, and support.

**IOSCO** - The International Organization of Securities Commissions (IOSCO), established in 1983, is the acknowledged international body that brings together the world's securities regulators and is recognized as the global standard setter for the securities sector. IOSCO develops, implements and promotes adherence to internationally recognized standards for securities regulation, and is dedicated to enhancing investor protection and promoting investor confidence. IOSCO's membership regulates more than 95% of the world's securities market and is one of the few international organizations that includes all the major emerging market jurisdictions within its membership.

**ANBIMA** - We are the Brazilian Financial and Capital Markets Association. The entity has the purpose of representing and defending the interests of more than 300 members including banks, asset managers, brokers, securities dealers and investment advisers, which reflects the plurality and independence of our association. We work for the representation and coordination of our members' interests, locally and internationally, and are dedicated to the development of a stronger capital market in Brazil. Our mission is based on four commitments: represent, self-regulate, inform and educate.

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