



IFIE Asia Chapter Mid-Year Face-to-Face Gathering and Problem-Solving Workshop
Sunday, 26 November 2017
Adjacent to Asia Securities Forum (ASF) Annual Meeting 25-28 November
Hosted by JSDA, Tokyo Japan

Annotated AGENDA

1. Welcomes and Introductions--IFIE Asia Chapter Chairman Fumiaka Miyahara, JSDA
2. Welcome Introduction—IFIE Global Chairman Koichi Ishikura, JSDA
3. Summary of IFIE Activities and Initiatives and Initial Planning for 2018—IFIE Secretariat Executive Kathryn Edmundson, IFIE Global Chair Ishikura, IFIE Asia Chapter Chair Miyahara—Feedback from Participants welcome
 - This meeting is 5th Midyear Meeting of IFIE Asia Chapter
 - 2013 ANMI hosted Investor Education Conference in New Delhi, India
 - 2014 ANMI AGM focused on Investor Education and adjacent meeting of IFIE Asia Chapter members in Mumbai, India
 - 2015 Adjacent meeting of IFIE Asia Chapter members to ASF AGM in Seoul, South Korea and ASF sessions on IE issues
 - 2016 Adjacent meeting of IFIE Asia Chapter members to ASF AGM in Manila, Philippines and ASF session on IE issues
 - 2017 Adjacent meeting of IFIE Asia Chapter members to ASF AGM in Tokyo, Japan and ASF session on IE issues
 - Summary of IFIE and IFIE Asia Key 2017 Meetings and Their Follow up/Other Programming:
 - IFIE Asia Chapter AGM 4 June 2017 adjacent to 2017 IFIE-IOSCO Global Investor Education Conference, Rio de Janeiro, Brasil-- Summary of session sent to all participants and all IFIE Asia Chapter members—link off IFIE website www.ifie.org for those involved in Chapter;
 - IFIE-IOSCO 2017 Global Investor Education Conference—“A Changing Era in Financial Capability/Investor Education Programming”—link to Conference results off IFIE and IOSCO websites



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- Post-Conference Growth and Emerging Market (GEM) Participant ½ Day Workshop, 9 June 2017
 - World Investor Week Pilot 2-8 October 2017 (see information at www.worldinvestorweek.org) and information on IFIE and IFIE Chapter projects, initiatives and engagement
 - IFIE Upgrade Infrastructure Project; IFIE Membership; Other IFIE Plans and Projects in Development 2017-2018
- End of 2017-Other Key Plans for IFIE and IFIE Asia 2018 Meetings and Programming:
 - IFIE Asia Chapter AGM-- 9 April 2018 adjacent to 2018 IFIE-IOSCO 10th Anniversary -- Annual Global Investor Education Conference Tokyo, Japan
 - 2018 IFIE-IOSCO 10th Anniversary – Annual Global Investor Education Conference hosted by JSDA, Tokyo Japan 9-11 April 2018
 - GEM Workshop will be held on Monday 9 April 2018—Overview of Plans Underway
 - Adjacent survey of IFIE Asia Chapter members to 2017 IFIE Annual State of Global Investor Education Survey (end of 2017/beginning 2018)—will include questions about priorities for programming and issues. Note this survey or a separate one will also inquire on practice related to financial education for school age children/youth.
 - Webcast programming and Other Working Group Themes or Workstreams can be set up tailored to members' interests in Asia; participation in IFIE/Asia Chapter Member Leadership Committee welcome
4. Roundtable Discussion —IFIE Chapter Member and Participant Comments, Updates, Challenges and Problem-Solving –including Discussion of World Investor Week from IFIE Asia Chapter Member perspectives
5. Other Business