



GLOBAL INVESTOR EDUCATION LEADERS GATHER IN ISTANBUL TO FOCUS ON CRITICAL ISSUES

Joint IFIE/IOSCO Conference, Co-organized by Turkish Capital Markets Association, Begins Today

ISTANBUL, Turkey – 13 June 2016 – The International Forum for Investor Education (IFIE) and the International Organization of Securities Commissions (IOSCO) today opened their eighth annual investor education conference in Istanbul, Turkey, with a focus on the best strategies for improving investor engagement in order to build financial capability.

Throughout the conference, titled “Global FC/IE Strategies and Implementation: Meeting Needs and Bridging Gaps,” speakers, panelists and practitioners from around the globe will share knowledge, experience and perspectives to make Financial Capability and Investor Education (FC/IE) strategies and programming more successful.

The full agenda, including panels, skills workshops and speakers, is available at www.ifie.org/2016conference.

This year’s programme is oriented towards capacity-building to meet existing and future FC/IE needs by working together across sectors; building bridges and alliances to develop and sustain efforts; highlighting ways to address FC/IE and investor engagement challenges in Growth and Emerging Market jurisdictions as well as in advanced markets; and using in-depth content, case studies, skill-building and problem-solving sessions to help provide implementable information.

IOSCO Secretary General Paul Andrews said, "It is critical in today’s global world that all stakeholders work together towards greater financial capability and protection of investors. I am very pleased that this conference provides a much needed forum to reinforce and support that to happen in practice."

Chairman of IFIE and Vice Chairman of FPD Turkey Alparslan Budak said, "IFIE has come a long way in becoming a global player in the financial education arena. I believe that this conference provides an excellent opportunity to listen to a very good number of speakers, experts from all around the world, with diverse backgrounds and views."

Turkish Capital Markets Association (TCMA) Chairman İlhami Koç said, “The financial crisis triggered demand for investor education around the world. In light of problems that have arisen, we are once again reminded of how important it is for individuals to become financially literate. I believe that the conference will provide an exceptional platform for all stakeholders to discuss challenges in the global arena.”

Participating experts include:

- Paul Andrews, secretary general, International Organization of Securities Commissions (IOSCO);
- David Boyle, group manager, Investor Education, Commission for Financial Capability (CFFC);
- Koichi Ishikura, director & chief officer for International Affairs and Research, Japan Securities Dealers Association (JSDA);
- Attila Köksal, chairman of the Financial Education Committee, Turkish Capital Markets Association (TCMA);
- Khairul Ridzwan Abdul Kuddus, deputy general manager and head of Investor Affairs and Complaints, Securities Commission Malaysia (SC);
- Noel Maye, chief executive officer, Financial Planning Standards Board Ltd. (FPSB);



- Douglas Melville, principal ombudsman and chief executive, Channel Islands Financial Ombudsman (CIFO);
- Flore-Anne Messy, head of the Financial Affairs Division and executive secretary of the International Network on Financial Education (INFE), Organisation for Economic Co-operation and Development (OECD);
- Leonardo P. Gomes Pereira, chairman, Securities and Exchange Commission (CVM), Brazil;
- Daniel Pfannemüller, head, Educational Institute and Associate Director, BM&F Bovespa;
- Olaf Simonse, leader, Money Wise Platform, Ministry of Finance, Netherlands; co-chair, Expert Subgroup on Long-term Savings and Investment, Organisation for Economic Co-operation and Development (OECD);
- 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;
- Helen White, head of Financial Capability, The Money Advice Service (UK); and
- Patrick Yu, senior vice president and partner, Head Financial and Professional Services Sector Asia Pacific.

Topics on the conference agenda include:

- Optimizing programmes that help retirement planning and initiatives to mitigate senior investor vulnerabilities;
- Emerging Fintech trends and impact on investor education programmes and strategies;
- Addressing financial capability and investor education needs of consumers of financial services that have emerged post global market and economic crises;
- Media Training;
- Behavioural economics trends in policy, research and practice;
- Building investor engagement among young adults and meeting needs of military personnel and their families; and
- Building and articulating value and return on investment in Financial Capability and Investor Education efforts.

The 2016 IFIE/IOSCO conference is sponsored by FINRA (United States), Securities Investor Protection Corporation (United States), CFA Institute (worldwide), ANBIMA (Brazil), TCMA (Turkey), and JSDA (Japan).

ABOUT THE GROUPS

The International Forum for Investor Education (<http://www.ifie.org>) is a global membership organization committed to strengthening resources and standards for financial capability and investor education within and across jurisdictions through such initiatives as global conferences; webinars; surveys; a resource clearinghouse; and development and distribution of best practices, implementation strategies, capacity building and leadership support. IFIE also has global regional Chapter networks of members in Asia (IFIE/AFIE), MENA (IFIE/MENA) and the Americas (IFIE/Americas) who work together to develop and implement approaches to regional challenges in financial education, financial capability and investor education. Chapter development in Europe and Africa is underway.

The International Organization of Securities Commissions (<http://www.iosco.org>), founded in 1983, is the international policy forum for securities regulators and is recognized as the international standard-setter



for the financial securities sector. The organization's membership regulates more than 95 percent of the world's securities markets in over 115 jurisdictions. IOSCO members have resolved:

- to cooperate in developing, implementing and promoting adherence to internationally recognised and consistent standards of regulation, oversight and enforcement in order to protect investors, maintain fair, efficient and transparent markets, and seek to address systemic risks;
- to enhance investor protection and promote investor confidence in the integrity of securities markets, through strengthened information exchange and cooperation in enforcement against misconduct and in supervision of markets and market intermediaries; and
- to exchange information at both the global and regional levels on their respective experiences in order to assist the development of markets, strengthen market infrastructure and implement appropriate regulation.

The mission of the Turkish Capital Markets Association (<https://www.tspb.org.tr/about-the-association-2/?lang=en>) is to contribute to the development of a community of professionals equipped with high level of expertise who are sincerely committed to ethical values and perceive competition as offering better products and services to investors with the ultimate aim of contributing to the development of the national economy and the capital markets.

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