

## Investor Education in a Digital World

### BETTER FINANCE INVESTOR EDUCATION WORKSHOP

23 March 2018 | 09.30 – 15.30 | FESE - Avenue de Cortenbergh 116, 1000 Bruxelles

(WIFI : FESE\_WIFI – Password: fese1974)

#### WORKSHOP PROGRAMME

09.30 – 10.00	Welcome coffee
10.00 – 10.15	Introduction by Aleksandra Maczynska, Executive Director of BETTER FINANCE
10.15 – 10.45	EFPA Spain - Andrea Carreras-Candi: <a href="#">EFPA Spain Financial Education Project</a> EFPA Czech Republic - Marta Gellová: <a href="#">EFPA Czech Republic Investor Education</a> FPSB - Noel Maye, Raymond Leban: <a href="#">Introduction to FPSB work</a> FESE - Richard Gardiner: <a href="#">Overview of FESE financial education work</a>

#### 10.45 – 12.45 PART I - ELEVATOR PITCHES

**Introductory presentations** by various BETTER FINANCE members on their initiatives, approaches, projects and challenges (**max 10 minutes**)

#### DIGITAL TOOLS

CZECH REPUBLIC: [FingrPlay](#) presented by Viktor Vodička (SČS, Czech Consumer Association)

FRANCE: [NextWise](#) presented by Aldo Sicurani (f2ic, Federation of Individual Investors and Investment Clubs)

AUSTRIA: [Investor Education in a Digital World](#) presented by Georg Pühr (IVA, Austrian Shareholder Association)

POLAND: [Investor education in Poland in the digital age](#) presented by Jarosław Dzierżanowski (SII, Polish Association of Individual Investors)

→ [Q&A](#): 10 minutes

#### SEMINARS

GERMANY: [Stock Exchange License](#) presented by Jella Benner-Heinacher (DSW, German Investors' Association)

BELGIUM: [VFB Investment Academy](#) presented by BETTER FINANCE (VFB, Belgian League for Investors)

UNITED KINGDOM: [Investor Education in the UK](#) presented by Helen Gibbons (UKSA, UK Shareholders' Association)

DENMARK: **The Danish Investor Academy** presented by Niels Mengel (DAF, Danish Shareholders Association)

SWEDEN: **Ung Privatekonomi** presented by Lars-Erik Forsgårdh (Aktiespararna, Swedish Shareholders' Association)

LUXEMBOURG: **Initiatives and challenges in Luxembourg** presented by Jean Medernach (Investas, Luxembourgish, Private Investors' Association)

➔ Q&A: 10 minutes

#### GENERAL

MALTA: **Investment Education Project** presented by Tony Borg (MASS, Malta Association of Small Shareholders)

SLOVENIA: **Share SUPPORT** presented by Kristjan Verbič (VZMD, Pan-Slovenian Shareholders' Association)

EU: **EOLE Programme** presented by Marc Mathieu (EFES, European Federation of Employee Share Ownership)

➔ Q&A: 10 minutes

12.45 – 13.30 Standing lunch

#### 13.30 – 14.30 PART II WORKING GROUPS / BRAINSTORMING

Tools / Approaches

- ➔ How can digital tools improve Investor Education?
- ➔ What is the best way to reach the intended target audience for Investor Education?
- ➔ What is the ideal target audience for Investor Education?

Themes /Subjects

- ➔ In which field is there more need for Investor Education?
- ➔ Which subjects are in most need of Investor Education?
- ➔ Where would Investor Education have the biggest impact?

**14.30 – 14.40 VOTE BY PARTICIPANTS** to select the two Best Practice cases to be presented at the Investor Education Conference on 3 July

**14.40 – 15.00** Reporting back from the Working Groups

- 15.00 – 15.20**
- Result of the vote
  - Way forward

**15.20 – 15.30** Wrap-up and closing remarks, Guillaume Prache, BETTER FINANCE