Financial Literacy and Education Commission

Public Meeting February 6, 2026

Trump Accounts Outreach and Youth Financial Education Opportunities

Panelist Biographies

Gerri Walsh is Senior Vice President of Investor Education at the Financial Industry Regulatory Authority (FINRA). In this capacity, she is responsible for the development and operations of FINRA's investor education program. She is also President of the FINRA Investor Education Foundation, where she manages the Foundation's strategic initiatives to educate and protect investors and to benchmark and foster financial capability for all Americans, especially underserved audiences. Ms. Walsh was the founding executive sponsor of FINRA's Military Community Employee Resource Group. She represents FINRA on the Federal Trade Commission's Scams Against Older Adults Advisory Group, the International Organization of Securities Commissions' (IOSCO) standing policy committee on retail investor education, the Jump$tart Coalition for Personal Financial Literacy, NASAA's Senior Investor Advisory Council and the Wharton Pension Research Council. Prior to joining FINRA in May 2006, Ms. Walsh was Deputy Director of the Securities and Exchange Commission's Office of Investor Education and Assistance (OIEA) and, before that, Special Counsel to the Director of OIEA. She also served as a senior attorney in the SEC's Division of Enforcement, investigating and prosecuting violators of the federal securities laws. Before that, she practiced law as an associate with Hogan Lovells in Washington, D.C. Ms. Walsh received her J.D. from N.Y.U. School of Law and her B.A., magna cum laude, from Amherst College. She is a member of the New York and District of Columbia bars.

Steven Johnson serves as the 42nd State Treasurer of Kansas and Chairman of the College Savings Plan Network (CSPN). Born and raised on a cattle and grain farm near Assaria, Kansas, Johnson studied Agricultural Economics at Kansas State University and later earned an MBA with an emphasis in finance and business policy from the University of Chicago. Johnson worked for Ameriprise Financial for 24 years and was responsible for investment advice, products and building asset allocation models. Johnson was elected to the Kansas House in 2010 where he served on budget committees and as chair for Pensions, Taxation and Insurance committees. He championed pension reform efforts that have been instrumental in reducing the state's unfunded liability by nearly 25 percent. Johnson is committed to serving Kansas as a responsible fiduciary of state funds and continues to assist with operating the family farm.

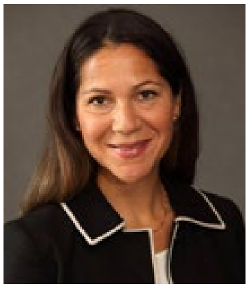
Chris Caltabiano oversees the conception, implementation, monitoring, evaluation, and reporting of all Council for Economic Education (CEE) programs, a portfolio that includes educational content, student competitions, teacher professional development, grant-making, assessment, and other activities. He also manages CEE's advocacy work at the national and state levels.

Prior to working with CEE, Chris was National Resettlement Director for the International Rescue Committee. Earlier in his career, Chris was a Peace Corps volunteer for three years in the Slovak Republic. Chris holds an M.A. in International Affairs from George Washington University and B.A. and B.S. degrees from Boston University.

John Moses became the Acting Director of the Office of Investor Education and Assistance in January 2026, previously serving as the office's Deputy Director since December 2020.

As Director, Mr. Moses will lead the office's efforts to provide financial planning information and resources for Americans to help them invest wisely, build wealth and avoid fraud. Previously, Mr. Moses served as Managing Executive in the SEC's Office of the Chairman where he advised the Chairman on matters relating to agency administration and operations and management.

A veteran of the U.S. Navy, Mr. Moses' military service includes deployments as a surface warfare officer and security team leader during Operation Iraqi Freedom. Prior to the SEC, he worked in the private sector in the technology and hospitality industries. Mr. Moses received undergraduate and graduate degrees from Stanford University and his M.B.A. from Harvard Business School.



Melanie Mortimer is President of the SIFMA Foundation, where she leads strategy to ensure all young people have the knowledge, skills, and confidence to navigate their financial lives and pursue economic opportunity. She oversees innovative programs that have reached 24 million youth, providing real-world investing experience, STEM engagement, workforce readiness and essential life skills, including The Stock Market Game™ and Capitol Hill Challenge™, and most recently, SMG InvestQuest™, an interactive mobile app teaching long-term investing and asset allocation. Previously, Melanie was Director of Global Philanthropy at Merrill Lynch, overseeing financial literacy, entrepreneurship, and signature grant initiatives across 70 countries, and held senior communications and editorial roles in Japan. A frequent speaker on financial capability, investor education, game-based learning and strategic philanthropy, she has been featured by The New York Times, CNBC, Fox Business, Yahoo Finance, and Nasdaq, and has presented at events for the Milken Institute, IOSCO, the U.S. Treasury, Jump$tart Coalition, among many others. She obtained her Master's in International Management and MBA from Aoyama Gakuin University in Tokyo, Japan as a Mombusho Fellow and her BA in English from Agnes Scott College in Georgia. She is a 2019 graduate of the Securities Industry Institute at Wharton.