



**Financial Literacy and Education Commission Public Meeting  
September 27, 2011 - 2:30 PM – 4:30 PM  
U.S. Department of the Treasury – Cash Room**

❖ **Welcome and Opening Remarks**

Mary Miller, Assistant Secretary for Financial Markets, U.S. Department of the Treasury

❖ **President's Advisory Council on Financial Capability Update**

Richard Ketchum, Chairman and CEO, Financial Industry Regulatory Authority (FINRA)

❖ **Financial Literacy and Education Commission Updates**

General Updates: Joshua Wright, Acting Director, Office of Financial Education and Financial Access, U.S. Department of the Treasury (Meeting Chair)

National Strategy: Karen Bellesi, Special Advisor for Community Affairs  
Office of the Comptroller of the Currency

Research and Evaluation: Barbara Smith, Office of Retirement Policy  
Social Security Administration

Financial Access: Luke Reynolds, Chief, Outreach & Program Development Section  
Federal Deposit Insurance Corporation

❖ **Financial Education and Financial Access Approaches**

Lynda Perez, Director, Division of Community Discretionary Programs  
Administration for Children and Families, Department of Health and Human Services  
*Discussing integration of financial capability into social services (Federal level perspective)*

Jonathan Mintz, Commissioner, New York City Department of Consumer Affairs  
*Discussing integration of financial capability into social services (local government perspective)*

Timothy Flacke, Executive Director, Doorways to Dreams (D2D) Fund, Inc.  
*Discussing saving bond campaign at tax time season*

Michael A. McBride, Acting Director, SPEC Headquarters Operations, Wage and Investment Division  
Internal Revenue Service  
*Discussing government touch points for access*

❖ **Conclusion and Announcement**

The next Commission meeting will be held on January 25, 2012.