

**DRAFT**  
**President's Advisory Council on Financial Literacy**  
**Seventh Public Meeting**  
**Department of the Treasury**  
**January 6, 2009 – 2 p.m. (EST)**

**Agenda**

- I. Welcome (3 minutes)**  
*Charles R. Schwab*  
*Founder, Chairman, and CEO*  
*The Charles Schwab Corporation*
- II. Brief Meeting Overview (3 minutes)**  
*Dan Iannicola, Jr.*  
*Executive Director*  
*President's Advisory Council on Financial Literacy*
- III. Review of Accomplishments in 2008 (5 minutes per representative)**  
*Ted Beck, Outreach Committee*  
*Representative, Research Committee*  
*John Hope Bryant, Underserved Committee*  
*Janet Parker, Workplace Committee*  
*Laura Levine, Youth Committee*
- IV. Annual Report to the President: Consideration for Approval (15 minutes)**  
*Open Discussion*
- V. Report on Financial Literacy and Education Commission Activities (2 minutes)**  
*Cutler Dawson*  
*Liaison to the Financial Literacy and Education Commission*
- VI. Other Business/Conclusion**