



# Teaching Personal Finance

Conference | Stanford University | September 29, 2022

## TEACHING PERSONAL FINANCE

### STANFORD UNIVERSITY

AGENDA - DRAFT

**Wednesday, September 28, 2022. Dinner with speakers and participants**

**Thursday, September 29, 2022**

#### **8.30 – 9.00 AM Introduction**

Welcome remarks from Jonathan Levin, Dean of Stanford GSB

Introductory remarks from Michael Boskin, John Shoven, and Annamaria Lusardi

#### **9.00 – 10.15 AM Session 1: New Courses in Personal Finance**

This session will discuss recently started courses, the initial responses these courses received, and plans for the future.

Panelists:

John Campbell, Department of Economics, Harvard University

James Choi, Yale School of Management

Terrance Odean, Haas School of Business, University of California, Berkeley

Kathleen McGarry, Department of Economics, University of California, Los Angeles

Moderator: John Shoven, Stanford University

#### **10.15 – 10.30 AM Coffee break**

#### **10.30– 11.45 AM Session 2: Teaching Personal Finance in Medium and Large Classes**

This session will discuss courses taught in medium/large classes, the experience over time from these courses, and how we can extend teaching personal finance to a large number of students and college/university-wide.

Panelists:

Michael Staten, College of Agriculture and Life Sciences, The University of Arizona

Joseph Fitter, Kelley School of Business, Indiana University

Paul Gregg, College of Business, University of Central Florida

Moderator: Michael Boskin, Stanford University

### **11.45 – 1.00 PM Session 3: Teaching Personal Finance in Small Classes**

This session will discuss courses taught in small classes and to honor students and how we can extend the experience to many students.

Panelists:

Gustavo Barbosa, College of Business, Loyola University New Orleans

Bento Lobo, Gary W. Rollins College of Business, The University of Tennessee at Chattanooga

Mahnaz Mahdavi, Smith College

Moderator: Timothy Taylor, Managing Editor, Journal of Economic Perspectives

### **1.00 – 1.45 PM Lunch break**

### **1.45– 3.00 PM Session 4: Sharing Insights from Teaching Personal Finance**

This roundtable will discuss insights from courses taught to a diverse group of students. We will also hear from authors who wrote textbooks on personal finance.

Roundtable panelists:

Nandita Das, Delaware State University

Vickie Bajtelsmit, College of Business, Colorado State University

Melissa Hart, North Carolina State University

Robert Clark, North Carolina State University

Roundtable chair: Olivia Mitchell, The Wharton School, University of Pennsylvania

### **3.00– 3.15 PM Coffee break**

### **3.15 – 4.45 PM Session 5: Other Experiences**

This session will share insights from teaching personal finance in high school and the military and from global initiatives on financial literacy.

Panelists:

Peter DeMarzo, Stanford GSB

Patrick Jenkins, Financial Times and FT Financial Literacy and Inclusion Campaign

Tim Ranzetta, Next Gen Personal Finance

Margaret Miller, The World Bank

William Skimmyhorn, College of William and Mary, formerly from U.S. Military Academy at West Point

Moderator: Annamaria Lusardi, The George Washington University

### **4.45– 5.00 PM Concluding Remarks**

Concluding remarks from Michael Boskin, Annamaria Lusardi, and John Shoven

### **5.00 – 6.00 PM Reception and Cocktail**