1. Welcome and remarks
   State Treasurer Tobias Read, chair

2. Lessons from national financial scorecards
   Simone Robbennolt, Prosperity Now
   John Pelletier, Champlain College
   Gary Mottola, FINRA Investor Education Foundation

3. Considerations and direction for an Oregon report
   Group discussion

4. Spotlight: Educating Oregonians about tax credits
   Codi Trudell, Department of Revenue
   Gregory Ivers, Department of Human Services

5. Member and agency updates

6. Public comment