

CHIARA MONTICONE

CV – February 2014

Contact information

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Current position

May 2011 –

Policy Analyst, Financial Education and Consumer Protection Unit,
DAF/FIN, OECD

- ✓ Analysis on financial literacy and education, financial inclusion, and related gender issues
- ✓ Statistical analysis of survey data, including PISA financial literacy assessment and surveys of adults
- ✓ Drafting of policy documents (OECD reports, working papers, policy instruments)
- ✓ Experience in the organization of and presentation at high-level OECD meetings and international conferences; Experience with non-OECD member countries

Previous positions

2005 – 2011

Researcher, Center for Research on Pensions and Welfare Policies, Collegio Carlo Alberto, Moncalieri, Italy

- ✓ Analysis on public and private pensions, financial literacy
- ✓ Quantitative data analysis, drafting of reports and academic papers
- ✓ Delivery of presentations to policy and academic conferences

2007-2010

Research assistant, International Center for Economic Research, Turin, Italy (part-time summer job)

- ✓ Analysis on credit availability to small firms
- ✓ Literature reviews and quantitative empirical analysis

Education

2008 – 2011

PhD Economics, University of Torino.

- ✓ Thesis: “Financial literacy and financial advice: Theory and empirical evidence”. Supervisor: Riccardo Calcagno

2008

Summer School in Discrete Choice Models, University of Bologna, Italy

2008

Course in Policy Evaluation Methods, Institute for Fiscal Studies, London

2004 – 2005

MSc Economics, CORIPE Piemonte, University of Torino

1999 – 2004

BA International Studies, University of Torino

- ✓ Thesis: “Women’s entrepreneurial activities in two cities in Mali”. Supervisor: Astrig Tasgian

2004

Traineeship, University of Torino/Université de Bamako, Mali

2002 – 2003

Erasmus Programme, University of Wolverhampton, UK

Refereed academic publications

- “Financial Literacy and the Demand for Financial Advice” (with Riccardo Calcagno), *Journal of Banking & Finance*, 50 (2015), pp. 363–380
- “Financial literacy and pension plan participation in Italy” (with Elsa Fornero), *Journal of Pension Economics and Finance* 10 (4): 547–564, October 2011.
- “How much does wealth matter in the acquisition of financial literacy?”, *The Journal of Consumer Affairs*, 44 (2), pp. 403-422, Summer 2010
- “An analysis of the effects of the severance payment reform on credit to Italian SMEs” (with Riccardo Calcagno and Roman Kraeussl), *Journal of Financial Economic Policy*, 3 (3): 243-261, 2010

Other publications

- “The Status of Financial Education in Africa”, OECD Working Papers on Finance, Insurance and Private Pensions, No. 25, 2012 (with F-A. Messy)
- “Adequacy of Savings for Old Age in Europe” (with Elsa Fornero and Annamaria Lusardi), in Bovenberg, L., A. Van Soest, and A. Zaidi (eds), *Ageing, Health and Pensions in Europe: An Economic Perspective*, Palgrave-MacMillan, 2010
- “Women and Pensions. Effects of Pension Reforms on Women’s Retirement Security” (with Elsa Fornero) in Marin, B. and E. Zolyomi (eds), *Women’s Work and Pensions: What is Good, What is Best?*, Ashgate-European Centre, 2010
- “Women’s Pension Rights and Survivors’ Benefits: A Comparative Analysis of EU Member States and Candidate Countries” (with Anna Ruzik and Justyna Skiba), ENEPRI Research Report No. 53, April 2008
- “Scenarios for the evaluation of future pensions’ adequacy” (in Italian) (with Flavia Coda Moscarola), AXA Italia, February 2008
- “Flexible Retirement in Europe” (with Elsa Fornero), European Papers on the New Welfare, No. 8, 145-158, September 2007

Presentations at policy conferences

- 2014 OECD/Thailand Seminar on Financial Inclusion and Financial Literacy in Asia, Bank of Thailand and the Securities and Exchange Commission, Bangkok, Thailand; Launch of the Italian financial literacy measurement results, Italian Banking Association, Milan, Italy; Launch of the OECD PISA financial literacy assessment of students, Rome, Italy; High-level International Conference on Global and European Trends in Financial Education, Capital Markets Board of Turkey, Istanbul.
- 2013 APEC Workshop on Guidebook on Financial and Economic Literacy, Washington, US; APEC Conference on Financial and Economic Literacy in Basic Education, Beijing, China; Russia G20 Presidency-World Bank-OECD conference on Empowering Consumers of Financial Products and Services, Moscow, Russia; OECD-World Bank Conference on building financial capability in Africa and the Middle East, Nairobi, Kenya; OECD-World Bank-Reserve Bank of India Conference on financial education in India and Asia, New Delhi, India.
- 2011 OECD-FSB Conference on Financial Literacy: Financial Education for All, Cape Town, South Africa.

Presentations at academic conferences/seminars

- 2014 Summer School on Gender Economics and Society, organised by ILO and Carlo Alberto College, Turin, Italy; Conference on the Policy Implications of Demographic Ageing, University of Padova, Italy.
- 2011 Netspar International Pension Workshop, Torino; 9th International Workshop on Pension, Insurance and Saving, Université Paris Dauphine; invited seminar at EM Lyon Business School; Behavioural Finance Working Groups Conference, Cass Business School, London.
- 2010 XIX Tor Vergata Conference on Money, Banking and Finance; 51st Annual Conference of the Italian Economists' Society; II SAVE Conference, Mannheim Research Institute for the Economics of Aging.
- 2009 XVIII Tor Vergata Conference on Money, Banking, and Finance; I SAVE Conference, Mannheim Research Institute for the Economics of Aging; "Improving Financial Literacy and Reshaping Financial Behavior" at the Networks Financial Institute at Indiana State University.

Referee reporting

Journal of Consumer Affairs, Journal of Pensions Economics and Finance, Public Finance Review, Journal of Public Economic Theory, Journal of Financial Management, Markets and Institutions

Personal skills

Languages Italian (mother tongue), English (fluent), French (fluent)
Statistical software Stata, SPSS