

DEMYSTIFYING CAPITAL MARKETS

A New Investor's Path to Building Wealth

WEDNESDAY
NOV. 20, 2024

2:00 – 3:30 PM ET

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Welcome Remarks



CRISTINA MARTIN FIRVIDA
Investor Advocate
SEC



LORI SCHOCK
Director
Office of Investor
Education and
Advocacy

Opening Remarks



STEPHANIE PRESSLEY
Executive Director
First Generation
Investors

Webcast information

Webinar number

2825 157 0861

Webinar password

20241120 (20241120 when dialing from a phone or video system)

Join by phone

+1-929-251-9612 USA Toll 2

+1-415-527-5035 US Toll

Access code

282 515 70861



Join the US Securities and Exchange Commission and First-Generation Investors, a 501(c)(3) organization, for a candid conversation on the U.S. capital markets and how to begin investing. This forum will provide early and first-generation investors with insights from regulators, investor advocates, and investment professionals about how to navigate the capital markets and forge a path toward financial prosperity.

Demystifying Capital Markets and Investing Primer



HESTER PEIRCE SEC Commissioner

During this session, SEC Commissioner Hester Peirce will provide an overview of our capital markets, including the role of the SEC in protecting investors, and will discuss how investing can be an effective way to achieve long-term financial goals.

Getting Started: Hear from Investors of Their Journey to Building Wealth

During this session, hear personal stories from investors on how they started to invest, why they started to invest in the capital markets and the lessons they have learned to protect their wealth building.

Moderator:



PAMELA GIBBS
Senior Advisor
Office of the Investor Advocate, SEC

Panelists:



COLE MATTOX
Co-Founder
First Generation Investor



KELLEY HOWES
Partner
Morrison & Foerster LLP



CHELSEA RANSOM-COOPER, CFP®
Chief Financial Planning Officer
Zenith Wealth Partners



YANELLY ESPINAL
Next Generation Personal
Finance

Investor Spotlight

YANELLY ESPINAL, Next Generation Personal Finance

Where do I begin?

LORI SCHOCK will share recommended steps for getting started

- <https://www.investor.gov/introduction-investing/getting-started/five-questions-ask-you-invest>
- <https://www.investor.gov/introduction-investing/getting-started/investing-your-own>.