



Agenda

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- **Attendees and apologies**
- **Executive summary**
- **Actions and objectives**
- **Understanding distributor integration priorities:**
 - FTRC to play back findings of research conducted with major advice firms. There will be an opportunity to review and discuss these findings.
- **Understanding CMS capabilities to receive data items from platforms:**
 - Discussion will focus on understanding the data fields CMS vendors support and whether this is more/less than is needed to accept data from a platform.
- **Documentation and schemas:**
 - What do parties have in place and is it enough?
- **Issues around testing**
 - Identify scope to improve the testing process
 - Getting advisers involved in the testing process
- **Previously deferred items carried over to this session:**
 - Data incompatibility issues
 - Resource and communication issues
 - Delivery mechanisms
- **Handling transaction histories for assets that have been re-registered**
- **AOB**