



Agenda

- This pack contains the slides presented at the Adviser, Wrap & Wealth Management meeting held on 21 February 2008.
- Slides with **purple banner** represent the meeting presentation; slides with **gold banner** represent additional views and conclusions from the meeting. Members' comments, additional text and actions are shown in **purple text**.

Agenda	Slide
• Executive Summary	6 - 8
• Objectives and actions	9 - 10
• E-commissions: <ul style="list-style-type: none"> • Discussion will focus on the drivers that have prompted advisers to review the e-commissions service and whether it is keeping pace with the changing environment. 	11 - 15
• Data cleansing: <ul style="list-style-type: none"> • Review what providers have done to make it easier for advisers to access details on policy numbers and the differing formats used. 	16 - 18
• SIPPs and valuations <ul style="list-style-type: none"> • Clarifying which providers are live with the CE message to support SIPP products 	19
• Contract Enquiry: <ul style="list-style-type: none"> • Optimum frequency for messages • Usage and error statistics, presenting a full 3 year view on CE messaging volumes and re-iterating the benefits of producing this analysis 	20 - 22
• Integrations: <ul style="list-style-type: none"> • Progressing data inconsistencies with providers and addressing the need for portals to pass data back to adviser client management systems 	23
• Short term projects: <ul style="list-style-type: none"> • Client authentication: delivering good practice notes to adviser businesses • Investment planning tools phase 2: brief update • Data security and adviser businesses: outline project scope and key deliverables 	24
• AOB	25