

- This pack contains the slides presented at the Wider Stakeholder meeting held on 28 February 2008.
- Slides with **lilac 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 **gold text**.

	<i>Slide</i>
• <b>Executive Summary</b>	5 - 6
• <b>Objectives and actions</b>	7 - 8
• <b>Wider Stakeholder:</b> <ul style="list-style-type: none"> <li>• Common processes, common issues</li> </ul>	9
• <b>Integration capabilities</b> <ul style="list-style-type: none"> <li>• Clarifying portal and provider capabilities in L&amp;P sector</li> <li>• Re-iterating the need for deeper integrations between client management systems and platforms</li> </ul>	10 - 12
• <b>E-commissions:</b> <ul style="list-style-type: none"> <li>• Detailed discussion focusing on the changing face of demand from advisers for the L&amp;P e-commissions services, including looking at the drivers for change and proposed actions to address issues</li> <li>• Brief overview of issues advisers are experiencing with platforms when receiving commissions data</li> <li>• FM and e-services: next steps</li> </ul>	13 - 18
• <b>Contract Enquiry</b> <ul style="list-style-type: none"> <li>• Coping with demand in the future; what will the service need to deliver, how will advisers use it and how will providers cater for this?</li> <li>• Brief update on providers and their CE plans for SIPP products</li> <li>• Policy data formats – what assistance can client management systems offer to assist advisers through the maze of provider reference numbers</li> </ul>	19 - 23
• <b>Short term projects:</b> investment planning tools good practice notes	
• <b>Short term projects:</b> client authentication good practice notes	24
• <b>Short term projects:</b> data security – outlining project scope and key deliverables	
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