Agenda

- **Adviser, Wrap and Wealth Management Forum in 2007 & 2008**
- **Re-registration**
    - Adviser firms are keen to understand how platforms can meet their obligations to clients under TCF in the absence of a P2PRR solution. Discussion will focus on the TCF obligations the regulator will expect advisers to meet.
- **E-services and the fund management community:**
    - FTRC have been working with the IMA to conduct a detailed current state assessment of the extent of these services and information will be presented back during the meeting
- **Platform e-commissions services**
- **Integrations between client management systems and platforms:**
    - Advisers stated in December 2007 that integrations between adviser client management systems and platforms is still a main priority and there now needs to be greater emphasis on measuring these capabilities. Discussion will focus on how to drive this forward.
    - Plus feedback from the major client management systems on the extent of integrations so far.
- **Access to legacy data:**
    - Access to legacy data via wraps is an area that advisers wish to address with platforms, discussion will start with understanding what data can currently be exchanged between parties.
- **Investment planning tools:**
    - Brief update on short term working group and main conclusions reached concerning investment forecasting, fund selection and portfolio re-balancing tools.
- **Client authentication & data security**
    - Brief update on short term working group focusing on developing client authentication processes for advisers.
- **Mortgage Forum**
- **AOB**