



Introduction & Agenda

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• Attendees and apologies	4 - 5
• Executive Summary	6 - 7
• Objectives and actions	8 - 10
• Integrations between CMS and platforms <ul style="list-style-type: none"> • Are platforms integration priorities consistent with what advisers are looking for? 	11 - 13
▪ Data security <ul style="list-style-type: none"> • What do the FSA expect advisers to focus on as a priority? • Secure data transmissions methods – what should parties consider about how client data is being exchanged between their organisations? • Client authentication process – Guidance Notes released 	14 - 16
• Remuneration models <ul style="list-style-type: none"> • Can platforms readily adapt to Consumer Agreed Remuneration models? 	17
• e-commissions <ul style="list-style-type: none"> • To what extent can platforms meet adviser e-commission data requirements? 	18 - 19
• Re-registration <ul style="list-style-type: none"> • Clarifying re-registration turn around times – how long does it really take to move assets between platforms? • "What you and your clients need to know about re-registration" – FTRC to present back a draft adviser guide for review and comment 	20 - 24
• AOB	25- 26