



Agenda

Agenda	Slide
• Executive summary	4 - 5
• Attendees and apologies	6 - 7
• Objectives and actions	8 - 9
• FSCS Levy update	10 - 11
• Contract Enquiry: <ul style="list-style-type: none"> • Play back outcome of March meeting between advisers and providers which discussed how rising volumes could be met. • What are the 'peaks and troughs' in the CE service? • Q1 2008 CE usage and error statistics 	12 - 20
• Straight through processing capabilities <ul style="list-style-type: none"> • Update on activity focusing on pre-population capabilities amongst client management systems, portals and providers. What is the extent of STP that is now available to advisers? • Re-population - what steps need to be taken to get this information back to advisers? 	21 - 22
• e-Commissions <ul style="list-style-type: none"> • Present back adviser responses and feedback from the "priority data requirements study". • Discussion will focus on establishing what steps are needed to take this forward i.e. what will providers need to do? 	23
• Adviser remuneration structures <ul style="list-style-type: none"> • Discussion will consider the traditional and emerging models. What types of remuneration structures will evolve? When is this likely to happen? • How will providers need to react to accommodate the emerging models? 	24 - 26
• Data security <ul style="list-style-type: none"> • Consider if there are any areas that advisers and providers believe could benefit from collaboration 	27 - 28
• AOB	29 - 30