



Agenda

Agenda	Slide
• Introductions	4 - 5
• Executive Summary	6 - 8
• Actions and objectives	9 - 11
• Contract Enquiry <ul style="list-style-type: none"> • What is CE? Talking advisers language • When and how will it be used? Review strawman. • CE tripartite framework – present recommendations • Demonstrating the benefits to advisers – how can we do this? • Valuations for endowments and WOL policies – identify developments taking place amongst the provider community to support these products. 	12 - 21
• Transaction History / Event Notification: <ul style="list-style-type: none"> • Identify adviser demand and reasons why these services are considered necessary. 	22
• E-commissions <ul style="list-style-type: none"> • Reviewing Provider processes to deal with clawbacks, debits etc – what do advisers consider to be good practice? • Identify the improvements that are needed around service set up and ongoing support for e-commissions. 	23 - 30
• Data security <ul style="list-style-type: none"> • Project update and passwords 	31 - 33
• Registering for e-services	34
• E-new business <ul style="list-style-type: none"> • Are e-new business services functionally rich enough to warrant adviser adoption? • Review portal e-new business capabilities across providers and client management systems – what is there today for advisers? 	35
• AOB	36