



Agenda

- This pack contains the slides presented at the Adviser L&P meeting held on 25 September 2008.
- Slides with **purple 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 **purple text**.

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• Attendees and apologies	3
• Executive summary	4 - 7
• Objectives: <ul style="list-style-type: none"> • What is meant by integration? • What outcomes are we looking to walk away with? 	8
• Background: <ul style="list-style-type: none"> • Brief overview of previous discussions and how we have got here. 	9 - 11
• Distributor views: <ul style="list-style-type: none"> • What are distributors seeking to achieve and why? 	12 - 13
• The issues	14
• User requirements: <ul style="list-style-type: none"> • What data do distributors want to exchange between their CMS and Platforms? 	15 - 16
• Data standards: <ul style="list-style-type: none"> • Achieving good practice 	17 - 18
• Documentation: <ul style="list-style-type: none"> • What this include and how should it be maintained? 	19
• Testing	20
• Prioritising other issues	21 - 24
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