



Agenda

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Agenda	Slide
• Introductions	4 - 5
• Executive Summary	6 - 8
• Actions and objectives	9 - 10
• Adviser June planning session <ul style="list-style-type: none"> • High level overview of key messages from Advisers. 	11 - 13
• Contract Enquiry <ul style="list-style-type: none"> • Understanding how advisers will use CE, how this could affect demand and requirements for data. • CE stats (Apr-July) – present back results. What does demand for the service look like? • Improving CE service – report back specific activity underway within Wider Stakeholder Group to improve the current service. 	14 - 18
• E-new business <ul style="list-style-type: none"> • New business channels • Role of portals • Constrictions to the marketplace 	19 - 22
• E-commissions <ul style="list-style-type: none"> • Phase 1 – taking this forward. Outline plans to include identified data requirements within all future e-Excellence studies. • Phase 2 – commission processing issues. Present back main adviser frustrations and identify what scope there is to resolve these. 	23 - 26
• Data security <ul style="list-style-type: none"> • Present back details of the project, the stakeholders plus, what we expect to deliver. • Group schemes – obtaining explicit authorities to hold client data. Feedback from an adviser firm who has had experience of this. (Carried forward from July Wrap Forum) 	27 - 29
• RDR <ul style="list-style-type: none"> • FTRC to replay outcome of meeting with AIFA 	30
• AOB	31

