



Agenda

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- **Introductions**
- **Executive summary**
- **Objectives and actions**
- **Fund identification codes**
- **Data security:**
 - Advisers, 3rd parties and due diligence – review 3rd party due diligence framework being created by the AF Data Security Working Group, will your firms be able to deliver the information they need?
 - Secure email
- **E-new business:**
 - What do advisers actually want? – Feedback to be delivered on the day, adviser views still being gathered via 121 meetings.
- **Contract Enquiry:**
 - Setting up Contract Enquiry – review the “Collaboration Guide” for advisers, CMS vendors and providers – what are your views and how can firms can take this forward.
 - Error messages – Understand how CMS vendors will use this information to assist advisers.
 - Provider CE operating hours – information request
- **Populating policy references into adviser systems**
- **AOB**