

Agenda

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- **Attendees and apologies**
- **Executive summary**
- **Objectives and actions (including specific updates)**
- **Good practices around fund codes**
- **Fund ID codes and adviser charging:**
 - Presenting information back to parties at the meeting. Consider what further information is required by parties and what next steps, if any, are needed.
- **Accessing transaction history on a ceding platform:**
 - Present back good practices recommendations that look at how advisers can access transaction history data from a platform once a client(s) has moved off or, in the event of a platform failing.
 - F&TRC seek your feedback to draft recommendations.

Coffee break

- **Discuss FSA views on inducements and investment planning tools.**
- **Interoperability of tools:**
 - How will advisers re-use their model portfolios within into tools supplied by the platform?
- **FSA review of platforms**
 - How will advisers demonstrate to the client (and FSA) that they have considered all costs associated with a platform e.g. product cost, platform cost, adviser cost, other costs?
 - Do platforms make this information readily available? Is it transparent and easy to understand?
- **AOB**

Lunch