

Agenda

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- **Attendees and apologies**
- **Executive summary**
- **Objectives and actions**
- **Contract Enquiry Legal Framework:** Quick update on progress being made to change CELF to allow advisers to pass on CE data to Platforms.
- **Improving e-valuation services:**
 - Delivering a service that costs pence, not pounds.
 - Removing barriers to deliver better services.
- **Error messages:**
 - Discuss how parties can improve the quality of error messages being returned to advisers. Review activity to address this and agree next steps
- **Adviser service models and information requirements:** What do Product Providers need to know?
- **Understanding Provider Fund ID code practices:** Discuss what an ideal fund code would look like plus, good practices concerning how such codes are deployed.
- **Timely asset allocation data:** Understanding who is operating recommended good practice.
- **Legacy product information:** Understand what Product Providers are doing to automate servicing for legacy products
- **Documenting integration requirements:** What do parties need to know about each other?
- **AOB:** Unipass and supporting advisers based offshore