



# Agenda

<b>Agenda</b>	<b>Slide</b>
• <b>Introductions and objectives</b>	3 - 5
• <b>Executive summary</b>	6 - 7
• <b>Actions</b>	8 - 11
• <b>Removing restrictions to allow CMS vendors to pass data to platforms:</b> <ul style="list-style-type: none"> <li>• F&amp;TRC to present an update.</li> </ul>	12 - 14
• <b>Documentation for integration partners:</b> <ul style="list-style-type: none"> <li>• As CMS vendors and platforms continue to expand the amount of data they can hold/pass, discuss how these developments can be documented (in lieu of standards) so integration partners can remain abreast of such developments.</li> <li>• Plus, what other information do integration partners need from each other? Identify and document.</li> </ul>	15 - 20
• <b>Carry forward item - good practices around testing</b>	21 - 23
• <b>Explore issues around data incompatibility:</b> <ul style="list-style-type: none"> <li>• Understand the nature of the client services advisers are now building and the need that creates for information.</li> <li>• What does this mean for parties who are delivering integrated data services?</li> <li>• What are the issues that need to be addressed/considered to ensure advisers can deliver client services in a cost efficient manner?</li> </ul>	24 - 29
• <b>Carry forward item - good practices communicating changes to integration partners.</b>	30 - 31
• <b>CMS vendor approach to handling transaction history data</b>	32 - 33
• <b>AOB</b>	34