



Agenda

Agenda	Slide
<ul style="list-style-type: none"> • Executive Summary 	4-5
<ul style="list-style-type: none"> • Attendees and apologies 	6-7
<ul style="list-style-type: none"> • Objectives and actions 	8-11
<ul style="list-style-type: none"> • Operational implications of RDIP (Retail Distribution Implementation Plan) 	12-13
<ul style="list-style-type: none"> • <i>What will adviser remuneration look like post 12/12?</i> <ul style="list-style-type: none"> • Discuss what Provider remuneration systems will need to deliver to advisers in a post RDR environment. • How far in advance of 12/12 will Providers need to deliver? 	14-18
<ul style="list-style-type: none"> • <i>Potential impact on client servicing post 12/12?</i> <ul style="list-style-type: none"> • What will advisers need from Providers? • Discuss whether current industry solutions can support this (or not) at any level. • Identify a timeline for the delivery of service enhancements/improvements – how far in advance of 12/12 will Providers need to deliver? 	19-23
<ul style="list-style-type: none"> • AOB – Income Protection and retirement age 	24-25
<ul style="list-style-type: none"> • AOB – Data Security Good Practice Notes 	26-27