Agenda

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• **Attendees and apologies**	4 – 5
• **Objectives and actions**	6 - 7
• **F&TRC to provide update following a meeting with AIFA concerning RDR**	8 - 12
• **Understanding adviser product and fund research requirements in an RDR world:** ○ What will the product universe look like? ○ Understanding the issues advisers face today when sourcing products/funds ○ What will this mean in terms of systems and developments	13 - 17
○ **Projection rates:** ○ Discuss the impact of FSA review of how Providers are using projection rates and the impacts of this.	18 - 22
○ **Contract Enquiry statistics** ○ F&TRC to present new analysis	23 - 26
• **Updating Contract Enquiry Legal Framework:** ○ Update following activity with Aviva, FP, L&G, Prudential and Standard Life who have been looking at developing a waiver to allow advisers to reuse CE data in 3rd party systems. ○ Can we reach agreement on revised wording be end of 2009?	27 - 34
• **Projection rules for non-MiFID products**	35
• **AOB**	36