

# Agenda & objectives

<b>Agenda</b>	<b>Slide</b>
• Objectives	3
• Introductions	4
• Executive Summary	5 - 6
• Investment Forum 2010 Agenda	7
• New Actions	8 - 9
• B2B e-Valuation Services	10
• Fund Codes and Good Practices	12
• Transaction History Data and Good Practices	13 - 14
• Interoperability of Adviser Model Portfolios	15
• Projection Rates Working Group	16 - 17
• Define Adviser Research Process and Systems	18
• Platform to Platform re-registration	19
• Integration with Client Management Systems	20
• Areas to Explore	21
• Other Topics Raised	22