

Agenda

Agenda	Slide
<ul style="list-style-type: none"> Attendees and apologies 	4-5
<ul style="list-style-type: none"> Objectives and actions update 	9-11
<ul style="list-style-type: none"> Fund Codes and Good Practice Guidelines (See separate document): <ul style="list-style-type: none"> Confirm understanding of the issues and why its important these are addressed. Review problem definition document and identify what issues could be addressed relatively quickly if parties co-operated? What issues will require a business case to be made and what information can Forum develop to assist firms in this process? 	12-24
<ul style="list-style-type: none"> B2C Valuations <ul style="list-style-type: none"> Is Contract Enquiry, in its current state, capable of supporting consumer driven valuation requests? Discuss. 	25
<ul style="list-style-type: none"> Projection Rates Project <ul style="list-style-type: none"> Confirm understanding of the issues and discuss the impact this will have on portals and research systems 	26-30
<ul style="list-style-type: none"> Research Systems and adviser requirements: <ul style="list-style-type: none"> Review outcome of adviser workshop assessing business requirements versus what is available today. 	31-34
<ul style="list-style-type: none"> AOB –data security (See separate document) 	35