



Adviser Forum

Adviser 121 meetings & Adviser Forum projects update

April 2009

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Purpose of document

- Play back results of the annual adviser planning meetings to:
 - Maintain an understanding of key operational issues faced by adviser firms.
 - Establish extent of demand and take up of e-services across advisers.
 - Ensure that the Forum Agenda going forward continues to collectively address the issues that are important to the adviser community.
 - Review what has been delivered by Adviser Forum.
- Will be a useful document for:
 - Organisations who want to maintain an understanding of the distributor marketplace.
 - Organisations who are developing and delivering e-services to advisers.