

Discretionary Management Forum

Thursday 22 April, 2010

INSTITUTE OF DIRECTORS – SOUTH WEST
Kings House, 14 Orchard Street, Bristol, BS1 5EH

AGENDA

10:00 am ~ Registration and Coffee

10:30 am ~ Welcome and Introduction

10:45 am ~ THE ROUTE TO DISCRETIONARY PERMISSIONS – PLAIN SAILING OR MOUNTAINEERING?

Russell Facer – Partner & Tony Bray – Head of Client Team- threesixty services

Discretionary Permissions allow Advisers to concentrate on the most enjoyable aspects of working with clients, building meaningful lifetime relationships, and a valuable business. threesixty will outline how to successfully plan the route forward including safe passage across the key obstacles that a firm may face.

11:30 am ~ PLATFORMS IN 2010

Freddie Findlater - Associate – The Platform

The Platform's Freddie Findlater will take a look at the latest developments in the platform market. As well as assessing the current players in the market, he will look at due diligence and selection requirements and share some interpretations of the FSA's latest thinking in this area. Questions from this session will be directed to our panel of speakers.

12 noon ~ Q&A Panel

12:15 am ~ LOOKING UNDER THE BONNET OF A DISCRETIONARY ADMIN SERVICE

David Hazelton - Head of Business Development – Raymond James Investment Services

David Hazelton will look at some of the key administrative functions that need to be considered by discretionary investment managers and how they can be delivered. He will cover the topic from a generic perspective and shed some light on the front, middle and back office functions.

1:00 pm ~ Light Lunch

2:00 pm ~ Close

RSVP by Friday 9th April, 2010 using our Online Registration Form: [REGISTER HERE](#)

Caroline.Hepburn@RaymondJames.com or telephone: 020 7096 6766

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Invitation