

# Discretionary Management Forum

Wednesday 19 May, 2010

INSTITUTE OF DIRECTORS – EDINBURGH

The Royal Scots Club, 29 – 31 Abercromby Place, Edinburgh, EH3 6QE

## AGENDA

9:30am ~ Registration and Coffee

10:00am ~ Welcome and Introduction

10:15am ~ THE ROUTE TO DISCRETIONARY PERMISSIONS – PLAIN SAILING OR MOUNTAINEERING?

*Phil Billingham – Strategy Consultant & 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.

11:00am ~ 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.

11:30am ~ Q&A Panel

11:45am - 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.

12:30pm ~ Light Lunch

1:30pm ~ Close

RSVP by Tuesday 4<sup>th</sup> May, 2010 using our Online Registration Form: [REGISTER HERE](#)

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**threesixty** THE PLATFORM **RAYMOND JAMES**  
INVESTMENT SERVICES

Invitation