

# Discretionary Management Forum

Tuesday 2nd February 2010

INSTITUTE OF DIRECTORS - CITY OF LONDON

New Broad Street House, 35 New Broad Street, London EC2M 1NH

## AGENDA

9:30am ~ Registration and Coffee

10:00am ~ Welcome and Introduction

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

*Russell Facer – Partner - 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

*Holly Mackay - Managing Director – The Platform*

The Platform MD Holly Mackay will take a look at the latest developments in the platform market. As well as assessing (and taking questions on) the current players in the market, she will look at due diligence and selection requirements and share her interpretations of the FSA's latest thinking in this area. This session has been designed to be highly flexible and to address your current questions and concerns about what is a very rapidly changing sector of the market.

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 Friday 15<sup>th</sup> January 2010 to

[Caroline.Hepburn@RaymondJames.com](mailto:Caroline.Hepburn@RaymondJames.com) or telephone: 020 7096 6766

threesixty THE PLATFORM

RAYMOND JAMES  
INVESTMENT SERVICES

Invitation