



# IMAP MDA Forum August 2017

# Presenters

- Toby Potter – Chair IMAP
- Mike Herron – National Practice Leader,  
Arthur J Gallagher
- Cain Jackson – Partner Wotton + Kearney

# Agenda

- Update on ASIC – IMAP negotiations on behalf of MDA Providers
- PI Insurance for MDA Providers
- Upcoming IMAP Events



# ASIC Update

- Engagement
- Issues
  - External MDA Adviser authorisation
  - Unregistered schemes
  - Duplication of content in FSG, Investment Program and MDA Agreement
  - SoA Review
- Next steps

# Upcoming IMAP Events

- Managed Account Central
  - FPA November 22
- InvestTech
  - Launch next Monday
  - InvestTech – December 5
- Investment Forum
  - Morningstar / DFS October 30
- Webinar
  - Ralton September 13
- MDA Forum
  - Best Interest – TBC
- FUM Census
- Perspectives - Quarterly



# Calendar

	August	Sept	Oct	Nov	Dec
InvestTech	Launch				InvestTech
Investment Forums			M'star/DFS		
MDA Forum				Best Interest TBC	
Webinars		Ralton			
Managed Account Central				FPA	
ASIC Briefing				TBC	
Perspectives	Portfolio Mgmt			Technology	
FUM Census	June Release				



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