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General Secretariat

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MEETING DOCUMENT

From:	General Secretariat of the Council
To:	Working Party on Financial Services and the Banking Union (Retail Investment) Financial Services Attachés
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Subject:	Retail Investment Strategy - CWP 11 September 2025 - draft agenda

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Agenda for working party on RIS in preparation for 3rd political trilogue

Council Working Party on Financial Services and the Banking Union

Date: 4. september 2025

11 September 2025 at 10:00

Please note that interpretation will not be provided in the meeting.

Agenda

1. Presidency opening remarks and adoption of the agenda (10:00 – 10.15)
2. Client categorization (10.15 - 11.00)
3. Value for Money (11:00 – 12:15)
4. Inducements (12:15-13:00)

Lunch Break (13:00 – 14:00)

5. Conditions and procedures for authorisation, organisation and registration (14:00-15.00)
6. Client Journey (15.00 – 16:00)
7. AOB and concluding remarks (16.00 – 16.15)