

Stakeholder CITSS Functionality and Design Webinar #2

Agenda

Welcome, Introductions, Presentation Review 10:00 – 10:10

Review of Feedback from Previous Design Webinar 10:10 – 10:30

Proposal #1 – CITSS Account Representative Permissions

Proposal #3 – Retirement Flexibility

Proposal #6 – Account Folders

Proposal #7 – Data APIs or Extracts

Review of Additional Proposals Received 10:30 – 11:00

Proposal #19 – Transfer Extract Data

Proposal #20 – Allocation Distributions

Proposal #21 – Exchange Integration

Proposal #22 – Serial Numbers

Questions / Comments (if needed) 11:00 – 12:00