

12 April, 2011

Presentation of the Ideal Advice report *For a drastic change in Relations with Investors*

Presentation of the Ideal Advice report ***For a drastic change in Relations with Investors***, drawn up by PwC and Caceis. Event organized with the support of PwC and in cooperation with EFPA.

Speakers: Alberto Constans, Director of the Finance Department of PwC in Catalonia
Ana Vázquez, Head of Fund Structuring at Caceis

The report, based on the result of the study on the degree of satisfaction of customers of financial entities, particularly in the context of the crisis, specifies that 3 lines of action should be taken in order to improve the quality of the financial advice given to customers:

- *Reinforcement of the obligation to act in the customer's interest*
- *Increase in the levels of transparency of information*
- *Improvement in both advisers' and customers' financial knowledge*

The event was attended by 90 people, as well as the EFPA associates who followed it *via* video streaming.