

finappster Sigma Client Meeting Two Minutes

Date | time: 23/07/21 10:00am-12:00pm Location: WT710-12

Meeting called by:	All	Attendees:	Chris Stehlin, John Sangalang, Peter Scandle, Jose Santos, Barry Dowdeswell, Leanna Kohn-Hardy
Type of meeting:	Weekly client meeting	Please read:	N/A
Facilitator:	Barry Dowdeswell	Please bring:	Laptop
Note taker:	Jose Santos		
Timekeeper:	Jose Santos		

Agenda Items

Topic	Assigned to:	Deadline
✓ KiwiSaver findings discussion:		
- Discussion on the research of the investments each team member's KiwiSaver scheme is invested in.	All	N/A
✓ Tips for R&D		
- Badger briefly mentioned tips on how we should function in R&D		
- Ensuring we record and document meeting minutes and we can choose to send them over to Badger every week for tips	All	N/A
- Discussed that we consultants to Leanna and we will be upskilled on how to be better at that role.		
- Play on your strengths but also try to focus on our weaknesses		
✓ Discuss our findings without KiwiSaver Investment Funds:		
- Leanna discussed us on how we were able to find out the invest companies.	All	N/A
- Team found out it was rather difficult to find that information.		
✓ Discussing Companies and Ethics:		
- Leanna explained the positive and negative screening companies	All	N/A
- Leanna emphasized that company's main goal is to make an impact and conduct positive actions		
✓ Discussion on the process of finding our investment funds	Leanna	N/A
- The team had lengthy process to find our investments		
- So, the main goal, that Leanna wants, is to cut out all of the phone calls, deep searching for the full portfolios and searching for the companies we are invested in to find how ethical our investments are.		

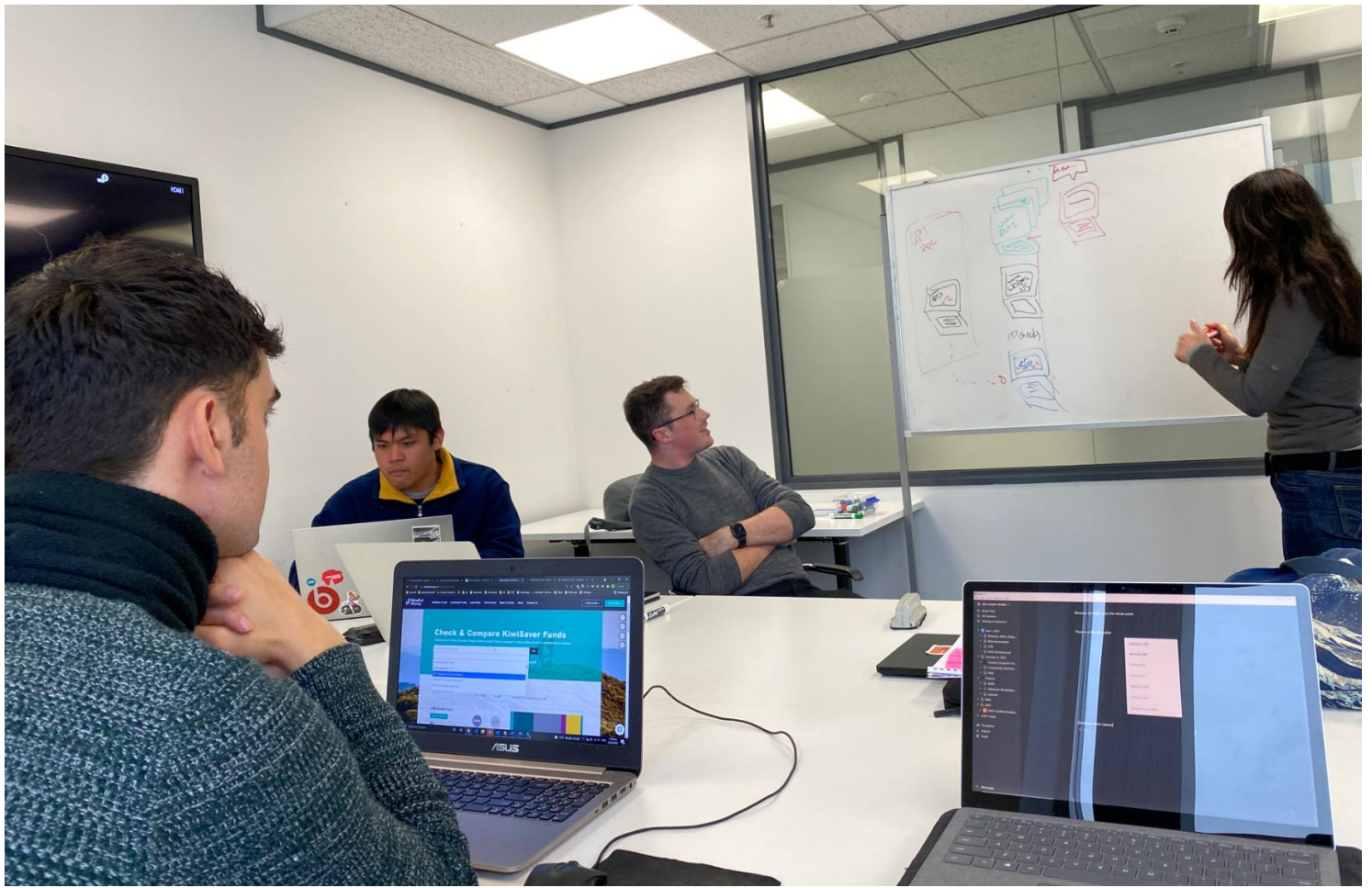
Other Information

Observers: N/A

Resources: N/A

Special notes: N/A





User

weighted

1
2
3
4
5

people?
partnership?
Place:
Prosperity?
Planet

meaning

1
logged in / LS app
quiz
set recommendations

no poverty
no inequality
no climate change
no pollution
no loss of biodiversity

2 (mm)
compare
quiz
set recommendations

PEOPLE
1) no poverty
2) no inequality
3) healthy people & long life expectancy
4) education
5) gender equality
6) life on land
7) economic sustainable cities

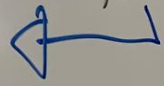
definition of what makes a good life

6 indicators

3
quiz
Find my own results
vs. / people like you

You might like them better

X
X
X
X
X
X
X
X



ASB

P 100%
P 100%
P 100%
P 100%
P 100%
P 100%
P 100%
P 100%