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| puma Meeting minutes | |
| Location: | 2620 Accutech Way, Muncie, IN 47304 |
| Date: | October 9, 2019 |
| Time: | 10:00 am |
| Members: | Ryland Babusiak  Jacob Knoll  John Perales  Thomas Ferrigan |

# Agenda Items

1. Introduction and summary on the history of Accutech Systems. Here Mr. Wu told us where Accutech is trying to move as a business, expanding itself into the larger banks at one point.
2. Explanation on Accutrust Cheetah and how it operates in the cloud. Hosted by the Amazon Web Service. There are no physical servers on campus at Accutech.
3. Here Mr. Wu then moves into the explanation on how trust funding works and how the proposal generator that we will be making will benefit them. This allows their clients to see the differences in how their accounts could managed from firm to firm.
4. Brokerage statement information, we asked questions about what exactly the format of the statement would be and how similar they would be from brokerage to brokerage.
5. When asking what technologies and standards they wanted we were met with a wide-open answer, they want us to show them what we can do and don’t really mind how it is accomplished.
6. Next, we go around the room introducing the team members, this allowed us to get a bit more comfortable talking with Garret and Phillip.
7. Lastly, we talk about communication and how to remember to reach out to them as much as we need.

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| Action Items | Owner(s) | Deadline | Status |
| Initial project explanation | Puma | Nov 18 – Nov 22 | In Progress |
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