**MUST HAVE**

* User-friendly GUI
* Functionality to enable RM to find clients easily from suitable ideas
* Database functionality
* User accounts
* RM accounts
* Investment ideas

**SHOULD HAVE**

* Investment idea categories
* User account setup
* Product “tags” e.g., product type, region

**COULD HAVE**

* Separate GUIs for RMs and clients
* Predicted ROI on products

**WON’T HAVE**

* Any email-based functionality