

9:

- 9:31 Introductions and proxy; Pat clarified Mkt would not attend
- 9:52 Nathan inquired about Business requirements, gave him ours and asked for opinion
- 9:33 Pat approved of first two business requirements, suggested a third (Mkt plan + business)
- 9:37 Pat started screen sharing and showed us a presentation on Mkt plans and financial literacy, goals of money free.
- 9:45 Nathan asks about average clientele, average user?
- 9:46 Pat - average user is average Joe works at company, not much room to spare financially
- 9:48 Nathan - Q about savings and goals
- 9:49 Pat -
- 9:51 Alex Q about how debt relief need to be achieved
- 9:52 Pat - recent aggregation will automatically decrease healthy debt vs unhealthy debt
- 9:53 Zach - Opting out of acc aggregation
- 9:54 Pat - Possibility to opt out
- 9:56 - Alex - Supersaver need?
- 9:58 Pat - Function include NO. of users, corporate via card, NetNet for employees hitting goals, therefore using recent aggregation. Why bus fail?
Employees puts money in system, goes towards goals and incentives for employees. Move up admin
- 10:02 Zach Q on gamification badges
- 10:03 Rewards for actions by receiving badges
- 10:04 Q on opt out for badges. Come up with?
- 10:04 Nathan Q on access to credit. Did environment
- 10:06 Nathan clarified tech stack (Alex, Nathan, Pat)

9:02 Alex @ about articles and info that are
linked.

10:08 Pat - articles + videos from instructors, leaders,
videos produced

10:09 ~~On~~ ~~Clarification~~, Clarifications about next sessions and goals

Minute Recorder: Alex

Medium: Zoom