

# Team Meeting

**Week # 1**

**Date: 3/21/2023**

**Time: 6:40 PM**

**Location: FMH 319**

|                           |  |                         |                 |
|---------------------------|--|-------------------------|-----------------|
| <b>Meeting called by:</b> | Josh Quizon  | <b>Type of meeting:</b> | Initial Meeting |
| <b>Facilitator:</b>       | Dustin La  | <b>Note taker:</b>      | Shaili Soni     |
| <b>Timekeeper:</b>        | Thomas Kataryniak  |                         |                 |
| <b>Attendees:</b>         | Joshua Quizon, Shaili Soni, Dustin La, Thomas Kataryniak |                         |                 |
| <b>Please read:</b>       | Facilitator, Recorder, and Timekeeper Roles              |                         |                 |
| <b>Please bring:</b>      | A good attitude  |                         |                 |

## *Minutes*

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|                              |                             |                   |             |
|------------------------------|-----------------------------|-------------------|-------------|
| <b>Week #1- Agenda item:</b> | Figure out what we're doing | <b>Presenter:</b> | Josh Quizon |
|------------------------------|-----------------------------|-------------------|-------------|

**Date: 3/21/23**

**Discussion:** Project timeline and understanding the project requirements.

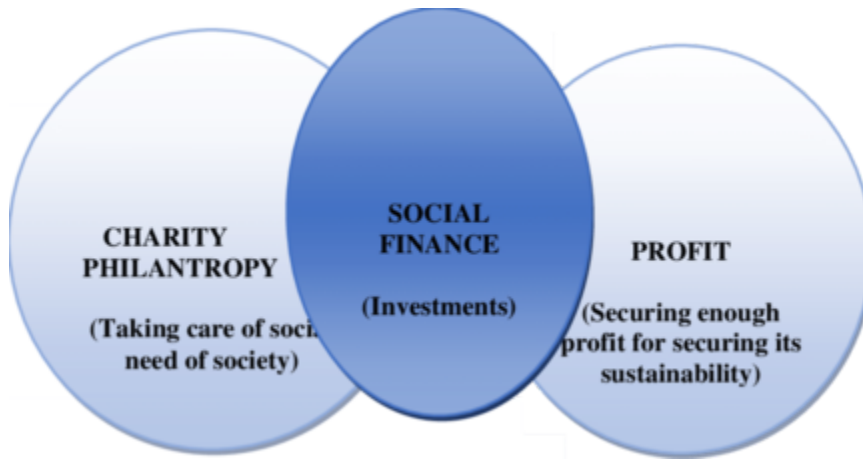
**Conclusions:** We should do research to prepare for brainstorming next week.

| Action items                         | Person responsible | Deadline  |
|--------------------------------------|--------------------|-----------|
| ✓ GitHub Setup                       | Joshua Quizon      | 3/28/2023 |
| ✓ Research 2 Social Finance Products | Everyone           | 3/28/2023 |
| ✓ Push individual research to GitHub | Everyone           | 3/28/2023 |

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## ***Other Information***

### **Resources:**



[https://en.wikipedia.org/wiki/Social\\_finance](https://en.wikipedia.org/wiki/Social_finance)

### **Special notes:**

Timeline for Project:

- Week 1: Researching
- Week 2: Brainstorming
- Week 3: Create Presentation
- Week 4: Practice Presentation

# Team Meeting

**Week # 2**

**Date: 3/28/23**

**Time: 6:00 PM**

**Location: FMH 319**

**Meeting called by:** Thomas Kataryniak

**Type of meeting:** Brainstorming Meeting

**Facilitator:** Josh Quizon

**Note taker:** Dustin  
La

**Timekeeper:** Shaili Soni

**Attendees:**

**Please read:** Enter reading list here

**Please bring:** Enter items to bring here

## *Minutes*

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**Week #2-  
Agenda item:** Develop specific details about the  
product, prepare items for slideshow

**Presenter:** Thomas Kataryniak

**Date:** 3/28/23

**Discussion:** Sharing research and brainstorming app ideas

**Conclusions:**

| Action items                                       | Person responsible | Deadline |
|--|--------------------|----------|
| ✓ Create App Visuals based on features             | Everyone, 2 each   | 4/4/23   |
| ✓ Social Finance brief definition for<br>slideshow | Everyone           | 4/4/23   |
| ✓ Prepare presentation template                    | Everyone           | 4/4/23   |

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## ***Other Information***

### **Resources:**

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### **Special notes:**

Apps we researched:

- RSF
  - Redistribute to charities
  - Investment
- Kiva
  - Crowdfund to help others
  - Reimbursed in the future
- SoFi
  - Banking, Investments, Loans all in one place
- Acorns
  - Investing spare change
- Intuit Mint
  - Combines multiple accounts (bank accounts, credit cards, retirement)
  - Track income
  - Categorize transactions
- Prudential Insurance
  - Financial advice
  - Financial roadmap
  - Professional service
- Acumen
  - donations

What is Social Finance:

- Investors
- Social enterprises
- Social finance
- Intermediaries
- Banking
- Investments
- Loans

Presentation

- Purpose of App
- Application itself
- Reasons for app

# Team Meeting

**Week # 3**

**Date: 4/4/23**

**Time: 6:00 PM**

**Location: FMH 319**

**Meeting called by:** Dustin La

**Type of meeting:** Create Presentation

**Facilitator:** Shaili Soni

**Note taker:** Thomas  
Kataryniak

**Timekeeper:** Josh Quizon

**Attendees:** Everyone

**Please read:** None

**Please bring:** App Visuals

## *Minutes*

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**Week #3-  
Agenda item:** Choose an app theme and create  
presentation

**Presenter:** Dustin La

**Date:** 4/4/23

**Discussion:** Synchronize app visuals design  
Decide presentation format  
Start creating presentation slides

**Conclusions:**

| Action items   | Person responsible | Deadline |
|--|--------------------|----------|
| ✓ Work on assigned slides                              | Everyone           | 4/11/23  |
| ✓ Incorporate app visuals with one theme               | Everyone           | 4/11/23  |
| ✓ Start thinking about what to say during presentation | Everyone           | 4/11/23  |

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## ***Other Information***

### **Resources:**

Check drive for updated app visuals

### **Special notes:**

- Intro - introduce the gap our app will fill
- Discuss research, existing finance apps and their demographics
- Showcase our app, list features
- Explain why our app is important to a new market / utility it could have in our lives

# Team Meeting

**Week # 4**

**Date:**

**Time:**

**Location:**

**Meeting called by:**

**Type of meeting:**

**Facilitator:**

**Note taker:**

**Timekeeper:**

**Attendees:**

**Please read:** Enter reading list here

**Please bring:** Enter items to bring here

## *Minutes*

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**Week #1-  
Agenda item:** Enter agenda item here

**Presenter:** Enter presenter here

**Date:**

**Discussion:**

**Conclusions:**

**Action items**

**Person responsible**

**Deadline**

✓ Enter action items here

Enter person responsible here

Enter deadline here

✓ Enter action items here

Enter person responsible here

Enter deadline here

✓ Enter action items here

Enter person responsible here

Enter deadline here

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## ***Other Information***

### **Resources:**

Enter resources here.

### **Special notes:**

Enter any special notes here.



