

Team Meeting

Week # 1

Date: 3/21/2023

Time: 6:40 PM

Location: FMH 319

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

Minutes

Week #1- Agenda item:	Figure out what we're doing	Presenter:	Josh Quizon
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Date: 3/21/23

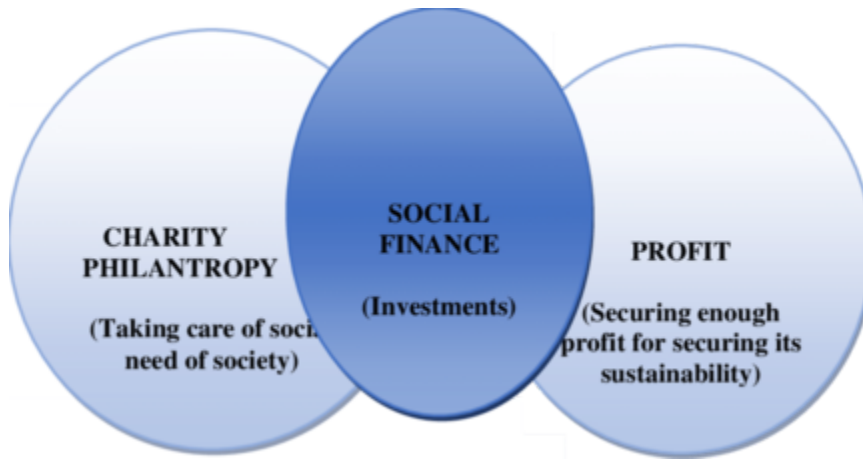
Discussion: Project timeline and understanding the project requirements.

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

Other Information

Resources:



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

**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 slideshow	Everyone	4/4/23
✓ Prepare presentation template	Everyone	4/4/23

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

**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

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: 04/11/23

Time: 6:19

Location: FMH 319

Meeting called by: Shaili Soni

Type of meeting: Practice/Rehearsal

Facilitator: Thomas Kataryniak

Note taker:
Joshua Quizon

Timekeeper: Dustin La

Attendees: Everyone

Please read: No

Please bring: No

Minutes

Week #4- Agenda item: Enter agenda item here

Presenter: Enter presenter here

Date: 4/17/2023

Discussion: Touching base on how far we got on the presentation, completing unfinished slides, and making minor changes to the styles of the slide. We will also be talking briefly about what we are going to say for our slides.

Conclusions: Finished the presentation and it is ready for submission. Last thing to do is practice presenting. We have a lot of time though since we are presenting last.

Action items	Person responsible	Deadline
✓ Finish presentation	everyone	4/17/2023
✓ Practice presentation	everyone	4/17/2023

Other Information

Resources:

None

Special notes:

- finished app importance slide
- minor changes to styling of slides
- moving slides around for better presentation flow
- **HOOK: Say Goodbye to Broke College Days and Hello to Financial Freedom: Meet UniPay, Your New BFF (Best Finance Friend) for a Thriving Student Life!**