

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

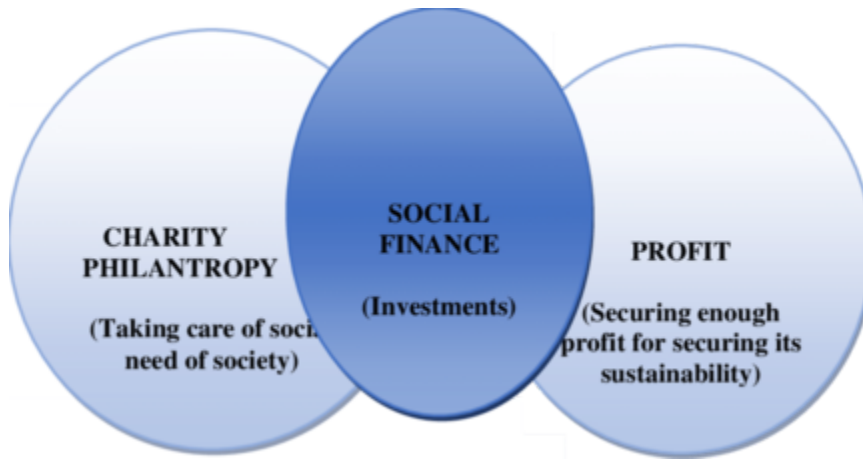
Discussion: Project timeline and understanding the project requirements.

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:

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

**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

Other Information

Resources:

Enter resources here.

Special notes:

Enter any special notes here.

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

**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

Other Information

Resources:

Enter resources here.

Special notes:

Enter any special notes here.

