* Opening ( ~1min )

Good afternoon, everyone.

My name is Terry Yuan, and I’m the feature owner of the new mutual fund investment option that we are going to roll out to the LBU soon.

Today, I’m here to give you a pre-rollout demo of this new feature, and show you how it will benefit our platform and our users.

* opening - question

But before I do that, let me ask you a question:

How many of you have invested in mutual funds before? [wait for a few seconds and observe the audience’s response]

I see. Well, whether you have or haven’t, I’m sure you will find this new feature very interesting and useful. [verbal: acknowledge the audience’s response and link it to your topic]

* opening - overview

In this presentation, I will cover three main aspects of the new feature: why we need it, what it is, and how it works.

I will also share with you the next steps for the rollout, and the support we need from the management.

My presentation will last about 6 minutes.

* part 1

So, without further ado, let’s dive into the first aspect: why do we need a new feature?

We all know Prudential has wealth management subsidiaries, right? PWL is one of it.

several months ago, I met the CEO of PWL, Janet. We talked about the performance of PWL, and Janet’s biggest challenge is that

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Janet was always thinking about how to improve it.

I was trying to give some advice, so I asked her do you know what the mutual fund market was last year?

As the ceo of a wealth management company, of course she knew it.

But What really surprised her was the speed of the increase.

The global net assets of mutual funds have **more than doubled** in size in less than a decade, reaching **62.3 trillion** U.S. dollars in 2022.

This shows that the mutual fund industry is huge, growing, and diverse, with a lot of potential and opportunities for our company and our users.

That’s why Janet finally, decided to introduce the new feature of mutual fund investment.

OK, So I think that covers the background of the new feature.

* part 2

let’s move on to the second aspect: what is the new feature?

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That’s all I wanted to say about ‘what’s the new feature’,

* part 3

Now, let’s turn to section 3: how does the new feature work?

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As you can see, the new feature is easy to use, intuitive, and responsive, and offers a great user experience.

The new feature is also secure, compliant, and reliable, as we have partnered with reputable mutual fund providers and followed the best practices and standards of the industry

OK, I think that covers this section.

* part 4

let’s move on to the final aspect: what are the next steps?

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**I think that covers the recent future plans,**

**So What else do we need to consider? [ pause 1s ] Yes,** We also have some challenges. **[ rhetoric question ]**

The main challenges we face are:

Regulatory compliance: We all know that financial regulation is strict, so we need to ensure that we follow the rules and regulations of the industry and the local authorities.

Data security: to ensure that we protect the data and privacy of our users and partners.

Customer education: to ensure that we educate and inform our users about the new feature and its benefits.

**OK, I think All things considered.**

**There is One more thing, most importantly, we need some support from management**

Approval : We need your Approval: to get the green light to proceed with the rollout.

Funding: We need your Funding: to get the necessary budget to cover the costs of the rollout.

Resources: We need your Resources: to get the adequate manpower to execute the rollout.

As you can see, we have a clear and realistic plan for the rollout, and we are confident that we can achieve it with your support.

* closing

**This brings me to the end of my presentation.**

I hope you enjoyed it and learned something new.

I would like to thank you for your attention and interest.

In conclusion, the new feature is a revolutionary option that will benefit our platform and our users in the wealth management segment.

* Q&A ( 2min )

Now, I would like to invite you to ask any questions you may have.

A screenshot of a diagram

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