

TEAM R&I

Client Meeting Agenda

Meeting/Project Name:	2018T2 R&I		
Date of Meeting (DD/MM/YYYY):	14/08/2019	Time:	19:00 – 19:45
Meeting Facilitator:	Liting	Location:	SIS MR 4-7

1. Meeting Objective

1. Weekly Discussion

2. Attendees

Name	Attendance	Remarks
Chow Li Ting	Present	-
Teng Shu Yan Rachel	Present	-
Thevakumaren S/O Morgaya	Present	-
Raghavendar Gowri Sankar	Present	-
Mok Hao Ze Benjamin	Present	-
T S Kautham	Absent	Overseas

3. Pre-work/Preparation (Documents/Handout to bring, reading materials, etc)

Description	Prepared By:
-	-

4. Agenda and Notes, Decision, Issues

Topic	Owner
Weekly Discussion <ol style="list-style-type: none">1. Comment out the progress bar<ol style="list-style-type: none">a. Because only client's account loads slower, the rest of the account doesn't show at all.b. Hence, comment it in case in future, we need it.<ol style="list-style-type: none">i. Ideal Scenario: Beautify the progress bar2. FX Forward<ol style="list-style-type: none">a. If balance in the bank account is less than the purchase price, FX Forward should not go through.3. Need another dashboard page for DCD<ol style="list-style-type: none">a. Move DCD under Wealth Portfolio.4. Disperse Amount for Loan<ol style="list-style-type: none">a. Old tBank is N/A but it's the same as our application	

5. Action Item

Action	Owner	Due Date
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Move DCD under Wealth Portfolio	Rachel	17/8/2019
Cater the FX Forward case – insufficient sum	Benjamin	17/8/2019
Beautify the progress bar else, comment out.	Theva	17/8/2019
Test out the app thoroughly before the next meeting	Liting, Raghav and Kautham	17/8/2019

6. Next Meeting (if applicable)	
Date (DD/MM/YYYY):	19/08/2019
Time	1900 - 2000
Location	SIS MR 4-7
Objective	Weekly Update