

## Client Meeting Minutes #10

Meeting Date	31 August 2016
Meeting Time	1600-1730
Mode	Physical
Internal?	With Mr. Soh
Members Present	All members are present
Agenda	<ol style="list-style-type: none"> <li>1. Discuss on target audience, to narrow it down to millennials instead of all retail investors</li> <li>2. Discuss on the Robot Advisor functionality – to see if the questions and scoring we have come up with is okay with the client</li> </ol>
Meeting Minutes	<ul style="list-style-type: none"> <li>• Showed our client our application and the functionalities we have developed since the last meeting</li> <li>• Decided on the Mid Terms date and time which the client has agreed with</li> <li>• Decided to narrow down our target audience from all retail investors to millennials because we are only able to get millennials investors as real users to survey and test our application</li> <li>• Discussed on how to make changes to our application to cater to the needs of millennials</li> <li>• Discussed about the questions and scoring for the risk assessment of our users; and talked about the 4 different perspectives to show for Robot Advisor</li> <li>• Client suggested to swap out StockBook Corp Action for a new functionality – to scan through a CDP e-statement and populate all the transactions into the user’s portfolio directly</li> </ul>
Upcoming To Dos	<ul style="list-style-type: none"> <li>• Update wiki page with our survey results</li> <li>• Research more about CDP e-statement format and whether we are able to read the file before getting back to our client on whether we are taking up this functionality or not</li> </ul>

The meeting was adjourned at 5.30pm. These minutes will be circulated and adopted if there are no amendments in the next day.

Prepared by,  
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Vetted and edited by,  
Jared Sim