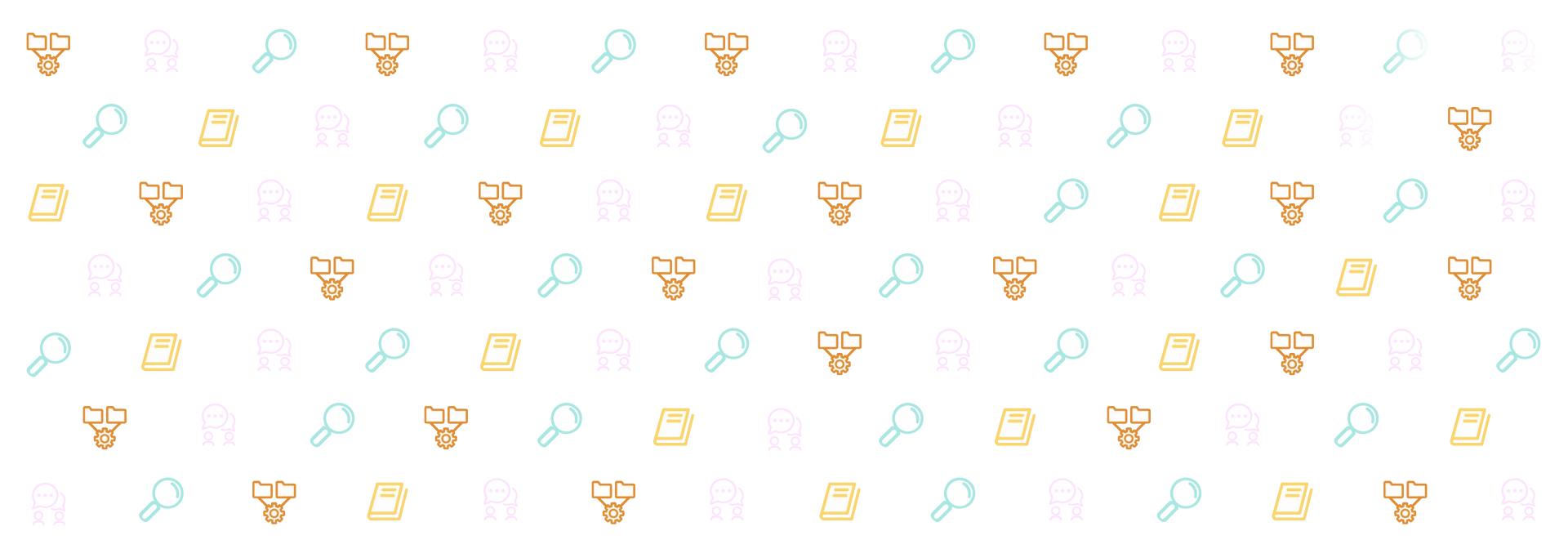
BlackRock | SCADpro

Winter 2020



BlackRock | SCADpro

Winter 2020



Content

Introduction

01

02

09)
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Team Members10Goal17

Research	19
Insights	31
Becky	35
Main Points	39

- 03
- Midterm Deliverables41Phase 1: gateway2.042Phase 2: BlackRock One48Phase 3: BlackRock Assist58



Final Deliverables In Process73

Web Prototypes78App Prototypes100Animation and Motion Design104BlackRock Assist114



Introduction

The Savannah College of Art and Design was proud to partner with BlackRock, one of the world's leading asset management firms during a ten-week SCADPro course. Eleven SCAD students were selected to assist in the research and development of concepts for the reimagining, modernization, and digitalization of the client experience for BlackRock's Institutional Client Business.

In this process book, you will see the journey of the project, from the streamlining of research for insights to creating innovative, creative solutions for BlackRocks's needs. The team of eleven students represents six SCAD Major disciplines, including Creative Tech, Animation, and Graphic Design, and they also come from five different countries across the world.

Team Members



Holly Quarzo

SCAD-Atlanta Atlanta, GA Professor of Graphic Design



Alessandro Imperato

SCAD-Atlanta Sheffield, United Kingdom **Professor of Motion Media Design**



Denise Anger de Medeiros

São Paulo, Brazil **B.F.A.** Animation





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Pleasantville, NY

B.F.A. Graphic Design Minor in business management and entrepreneurship Nick Loy

Greenville, NC **B.F.A. Motion Media Design** Alana Mango

Atlanta, GA **M.F.A. Animation**



Matthew Payne

Manchester, United Kingdom B.F.A. Advertising and branding concentration in Copy-writing





Alexander Payne

Greenville, SC **B.F.A. Motion Media Design** Alex Phelps

Atlanta, GA

B.F.A. Graphic Design, Minor in business management and entrepreneurship



Pardis Pourshiravi

Atlanta, GA Isfahan, Iran **B.F.A. Graphic Design**



Ciara Robinson

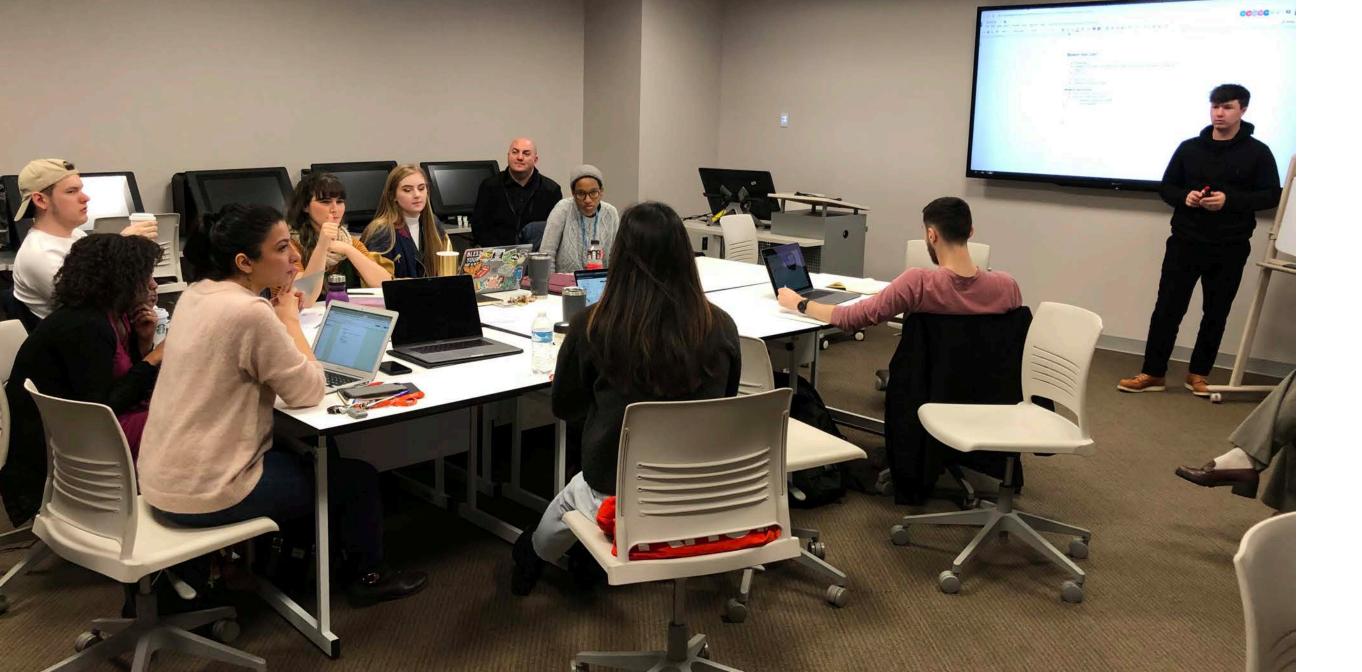
Rockville, MD **B.F.A. Game Design and Development**





Goal

Our goal is to facilitate BlackRock in setting a new industry standard by creating an optimized institutional client experience.



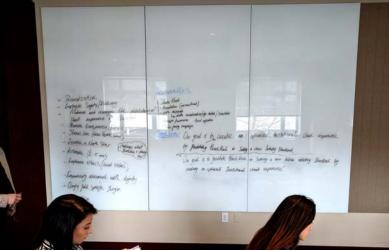
Research

Guided by the objective, as well as client information, the following pages show the process of the team's research. The development of insights, creative ideations, and deliverables were all derived from the in-depth research process.



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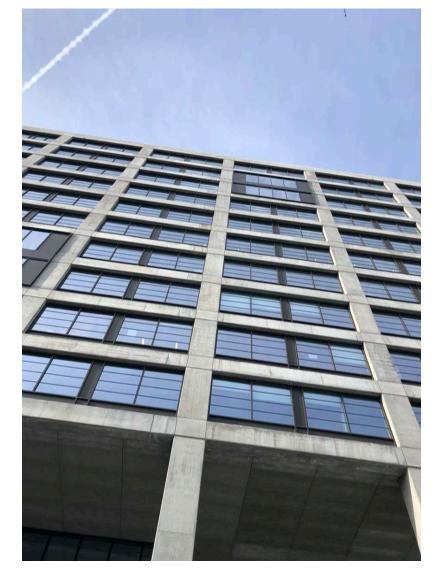




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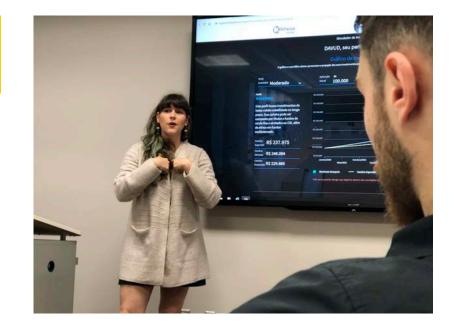




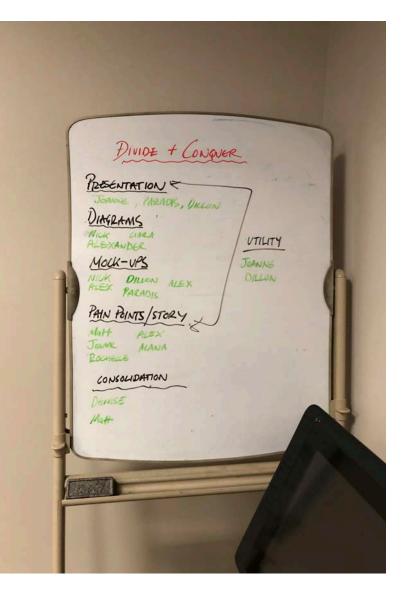


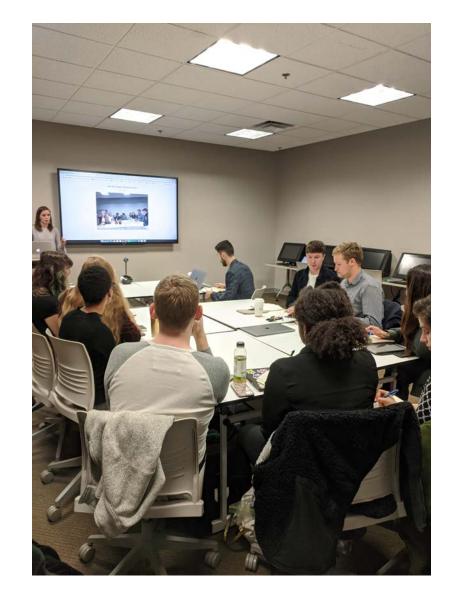




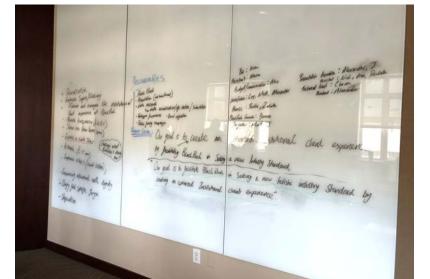




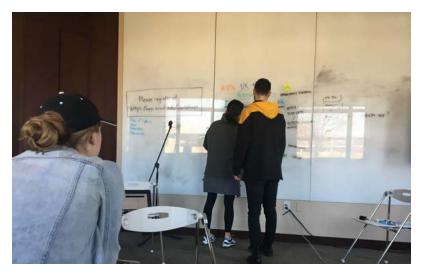








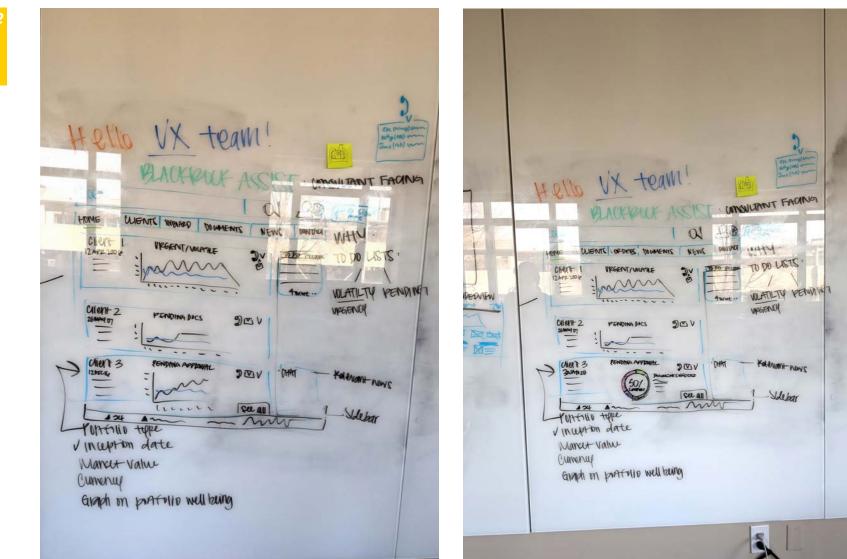










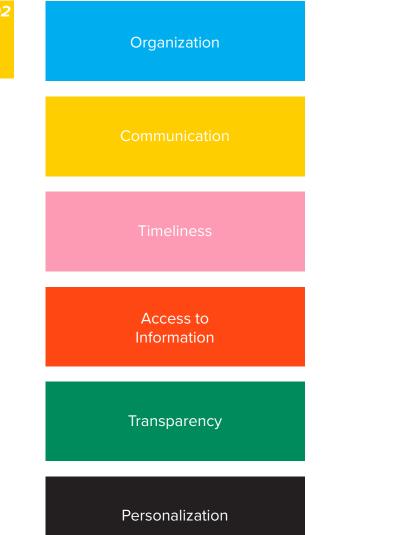






Insights

BlackRock provided the team with a lot of information to help guide their project and eventual solutions. The students, who were not familiar with the world of asset management had to dive headfirst into research, enveloping themselves in the world of BlackRock and finance. The following pages show the key insights derived from the research process.



No easy way to sort through documents to find what you need It's hard to keep track of who has the latest version of a document The experience needs to be more data rich There's no direct access to third party data No clear indicator of where the client is in the on boarding process On boarding takes an extensive amount of time Not easy to transfer money to a different manager No quick way to transfer files/documents Acronyms that are not easily understood by people outside BlackRock Can't easily compare funds Clients don't know what they can do inside gateway or they're unfamiliar Confusing to sort through portfolios Difficulty in getting to know the client (AML-KYC) No mobile access "Contracting with BlackRock is incredibly slow and difficult...

No easy way to share documents

"The responsiveness is not always as good as we'd like... It costs us "Tell me about the long term effect and outlook on existing funds" "Provide me with access to slides before and after the event." "If a topic affects the outlook of this fund, I'd be interested" "When a fund isn't performing as expected, I need to know why" "Make things easier to find" "High pressure to deliver reports on time" "Difficult to know what files you need and where to find them" "Consultants want ability to find out details by themselves" "Investment consultants cover more than just one role" "I need to find out if there are new or updated funds that can potentially appear on the buy list." (*pgs 33-46) "I want details on the strategy, credentials and volatility of the fund, and of the team behind it."

BlackRock is...the most difficult and inflexible to deal with

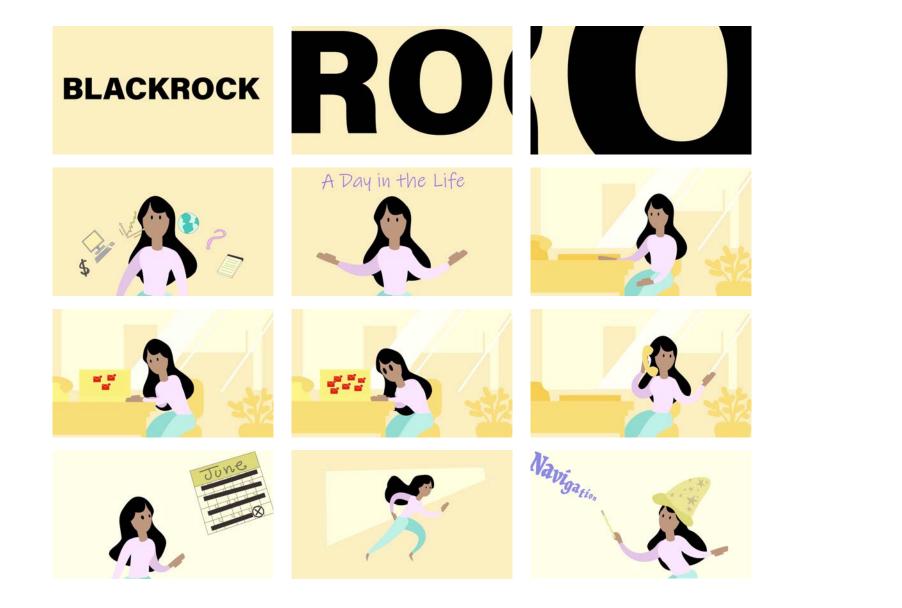
"BlackRock needs to be honest and tell me why a fund is under-performing" "I want to appear knowledgeable and recommend the best next steps for my client" "Make performance data and fact sheets available timely" "Show funds related to clients" "Highlight fund performance issues" "Raise awareness of new funds" "You would build trust if you were open and honest about why funds are under-performing" "Share relevant market insights (eg legislative, mass market, political long term) and their effect on related funds' outlook" "Highlight BlackRock events, summary and slides" "Quick view to find the right contacts within BlackRock" "Select topics, news, asset classes fund changes to watch" "Enable listing and client mapping for funds" "Show the right share classes for clients" "Show people related to the fund and their credentials" "Support custom date ranges for fund display and export"

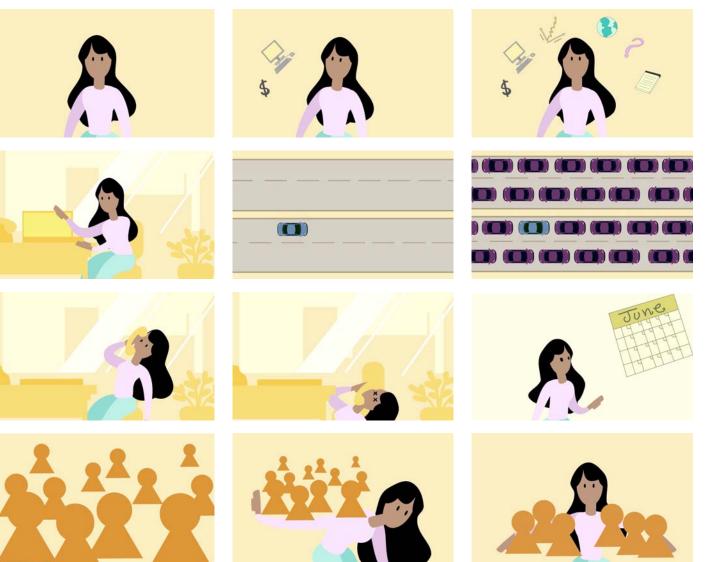


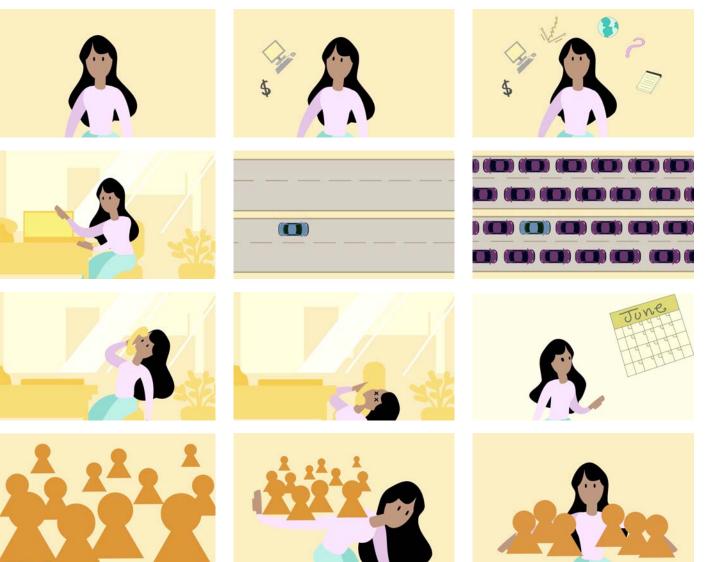
Through the use of an animated avatar, the SCADPro team was able to provide more context. Becky was positioned as an internal relationship manager at BlackRock. By outlining her frustrations and pain points through an animated video, BlackRock was able to perceive the content in a more humanized way.

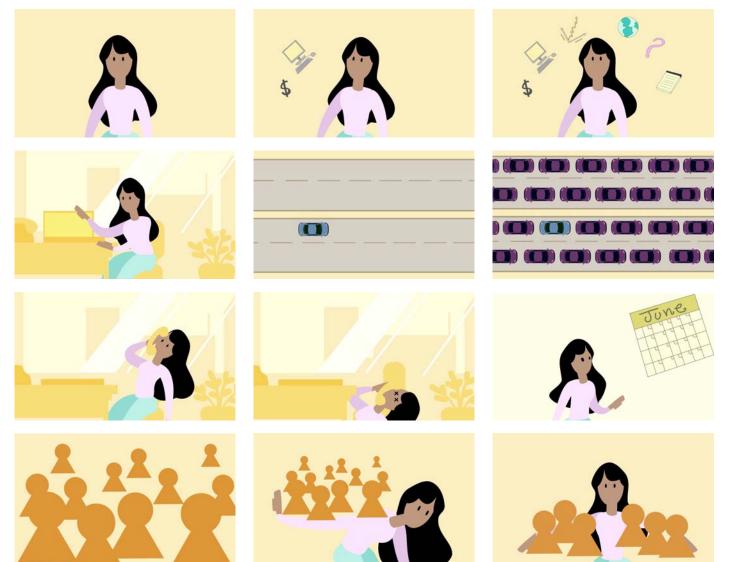
Becky

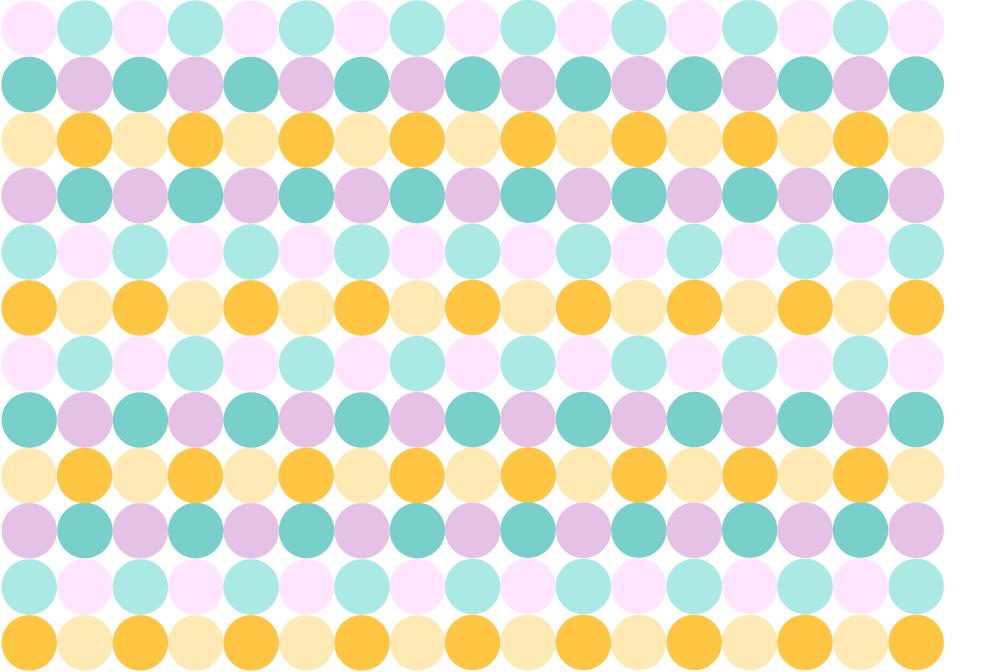
BlackRock Representative











Main Points









Communication

Education

Transparency

Automation



Midterm Deliverables

At the halfway point of the project, the SCADPro team visited the BlackRock headquarters to present their ongoing work. During the presentation, they shared their insights, research, and began showing their solutions.

Phase 1: gateway2.0

The team decided to offer BlackRock a strategy consisting of three phases for the integration of their solution. Phase One tackled the existing internal portal that was used by internal BlackRock representatives. The SCADPro students created a revitalized interface, tackling challenges they had heard that included a more transparent experience and access to fund information.



gateway2.0

gateway2.0

BlackRock Home Clients Orders Documents Funds Contact a 🛊 🛓 Southern Company 26 MAY 2007 Fixed Income Pending Order ~ To-do Market Performance Review Southern Company Order Market Value 600,385,490.32 USD Send Acuity Brands Inc. to Legal Review FleetCor Order Output Impa - heating --------... Q. Search Interrupt or Some ... Part lines Acuity Brands Inc. 28 DEC 2019 Fixed Income Market Value - USD Contract Review ~ Sensis Sergman Onboarding Proces Steps in Contract Review: 1. Read Contract Crepary Payles 2. Legal Sign Off a webcome 3. Client Sign Off ate York 35% Dimension and 4. Consultant Sign Off Contract Approval 5. Send O belect funds D fariber -... () fail head 12 mars ago. FleetCor 12 APR 2006 Fixed Income Pending Order ~ Harket Performance Cire Deytar Market Value 213,998,467.72 USD Bathan Kines -----------... Add Client to Home See All Clients

gateway2.0, Home

Consultants can pick which client snapshots they see on the home screen, edit their to do list, and use an integrated email inbox so they can communicate without exiting gateway. BlackRock (all sector) 0.6451 M Danes 000216 M Dane DOUMENT M Danes extendigiblestorial Const Subscription Danes Doublest M Danes Mars Subscription Const Subscription M Danes Mars Danes Mars Subscription Part Danes M Da

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gateway2.0, Documents

Consultants now have an easier way to access, organize, and find the documents they need.

All fun	ds → Asset Class →	Marke	its and Re	gions 🛩	Avera	ge annua	l return N	AV (%) ~	Q	ewith .		To-do			
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IVV	iShares Core S&P 500 ETF	31.44	31.44	15.23	11.65	13.50	6.15	Dec 31, 2019	May 15, 2000	203,365M	+			See Who	Ne List
IEFA	iShares Core MSCI EAFE ETF	22.67	22.67	9.99	6.28	17	715	Dec 31, 2019	Oct 18, 2012	74,958M	+	_	Culture	100	
AGG	Shares Core SEP 500 ETF	8.68	8.68	3.99	3.00	3.65	4.05	Dec 31, 2019	Sep 22, 2003	72,718M	+	0.14	ch because ar barrie		
EFA	iShares Core U.S. Aggregate Bond ETF	21.94	21.94	9.50	5.61	5.41	5.40	Dec 31, 2019	Aug 14, 2001	63.180M	+		Paul Linnes Laure grant data in and Lanachia		1
IEMG	iShares Core MSCI Emerging Markets ETF	17.50	17.50	11.09	5.37	-	3.73	Dec 31, 2019	Oct 18, 2012	59,583M	+	٩	Pendis Bergman Loost guest date of and Constitute		1.000
ин	iShares Core S&P Mid-Cap ETF	26.14	26.14	9.20	8.96	12.61	9.31	Dec 31. 2019	May 22, 2000	52.041M	+	3	Gregory Payse Lover qualitation of an eff (anachdra		
1WF	iShares Russell 1000 Growth ETF	36.08	36.08	20.25	14.42	15.00	5.37	Dec 31, 2019	May 22, 2000	50,237M	+	0	Bale Stang Lond gave this is and Lonardon		(Inserve
UR	iShares Core S&P Small-Cap ETF	22.79	22.79	8.37	9.55	13.31	9.95	Dec 31, 2019	May 22, 2000	46,704M	+	0	Rent Burg Lower plant blir ef and Canaching		-
IWM	IShares Russell 2000 ETF US Class	25.42	25.42	8.56	8.24	11.83	8.03	Dec 31, 2019	May 22, 2000	43,959M	+	0	End Press) Lanet probability of and Constants		12 mart 4
IWD	iShares Russell 1000 Value ETF	26.34	26.34	9.51	8.11	11.59	7.04	Dec 31, 2019	May 22, 2000	40,434M	+	0	Nye Bolitika Laket quari fela al and Lineartha		100.0
USMV	iShares Edge MSCI Min Vol USA ETF	2777	2777	15.50	12.43	-	14.62	Dec 31, 2019	Oct 18, 2011	38,220M	+	0	Chee Barynar Lonari guore della of actual l'association		1 Marca
LOD	iShares iBoxx \$ Investment Grade Corporate Bond ETF	17.13	1713	6.50	4.84	5.93	5.73	Dec 31, 2019	Jul 22, 2002	35,356M	+	0	Bolhan Kino Linet gazt blie if your (reacting	_	- 1 100 1
EEM	iShares MSCI Emerging Markets ETF	17.67	17.67	10.92	4.99	2.85	10.60	Dec 31, 2019	Apr 07, 2003	28,687M	+			See Al	Emails
IVW	iShares S&P 500 Growth ETF	30.91	30.91	18.46	13.32	14.57	5.92	Dec 31, 2019	May 22, 2000	25.263M	+				
тоті	IShares Core S&P Total U.S. Stock Market ETF	30.87	30.87	14.55	11.31	13.36	8.92	Dec 31, 2019	Jan 20, 2004	25,015M	+				
Select fu	inds to compare								1.23	2345	41 >				

gateway2.0, Funds

To streamline the experience further, consultants can view BlackRock's fund information within the portal. BlackRock 10001411-792 contact un@blackrook Hears: 8 a.m. - 6 p.m.

Summary

Integrated email system



Emphasis on documents



Access to fund information



Implementation of to do list

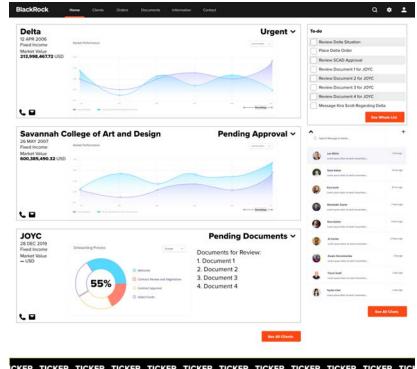
Phase 2: BlackRock One

The second phase that the team provided delved into automation, a concept that would propel BlackRock towards their North Star. This phase would enable BlackRock to set a new industry standard for asset management for all, by connecting internal teams with consultants like never before.



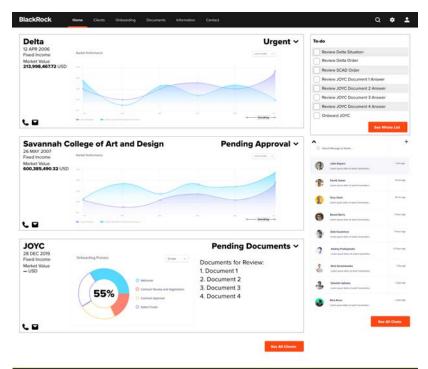
BlackRock One

Visible to both consultants and BlackRock, communication and transparency are more streamlined. The portal is now automated. The to do list is now automatically generated, and the clients that appear on the home screen are determined by the to do list.



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BlackRock One Consultant View, Home

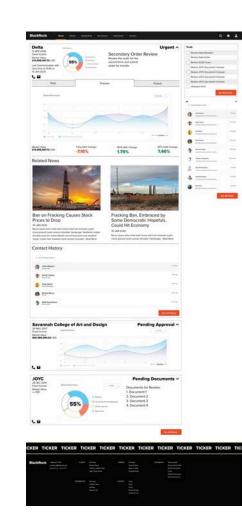




BlackRock One BlackRock View, Home

BlackRock One

BlackRock One Consultant view, Home Expanded client view This provides a more detailed breakdown of the client, including past, present, and predicted portfolio performance, relevant news, and contact history with automated important talking points for easy reference.



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BlackRock One BlackRock View, Home

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BlackRock One

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Consultant view, Orders Consultants can place orders one step at a time and have the ability to see their pending orders and order history.

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Order History 4	Subscription		\$23,078		25 Jan 2020		Taylor Chail	1000
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Order History 2	Rederigitor	\$10,832	26 Jan 2020		Training Tambi	100	
Order History 3	Subscription	\$19,758	26 Jan 2020				
Order History 4	Subscription	\$23.078	25 Jan 2020		Taylor Chail	1.000	
Order History 5	Redemption	\$37260	24 Jan 2020				

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Summary



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Personalized Information

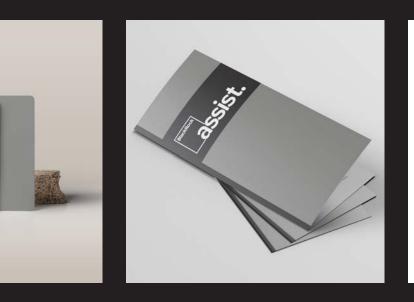


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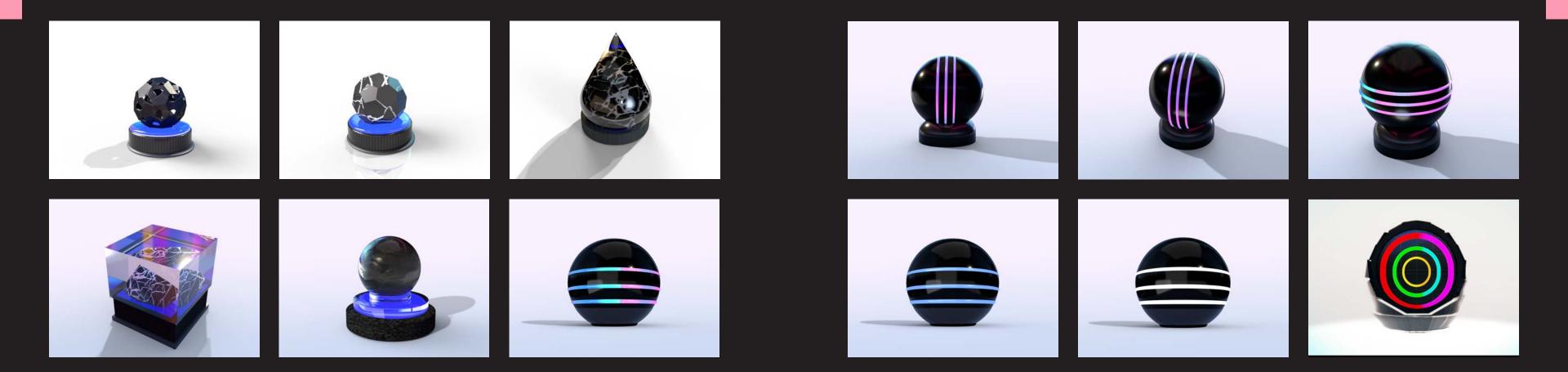




Phase 3: BlackRock Assist

The pista-resistance of the solution space, Phase three. BlackRock Assist enables both internal teams and consultants to interact in the most transparent and efficient way possible. Through the use of automated data, the SCADPro team provided BlackRock with a proprietary, multi-faceted user experience.





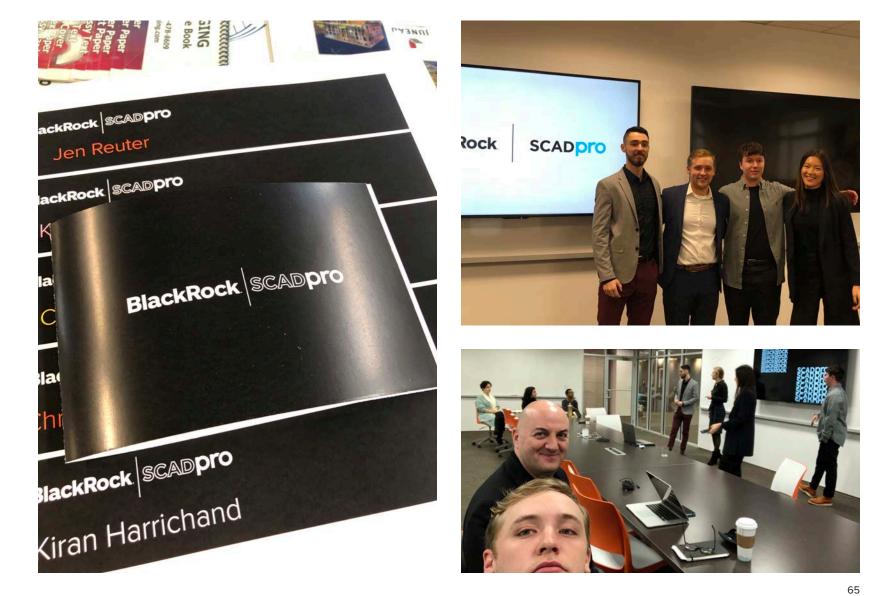




























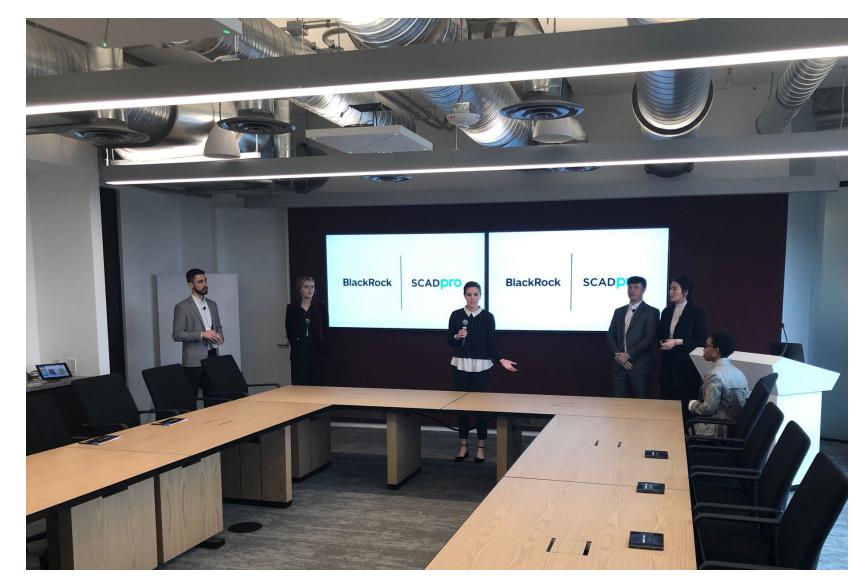


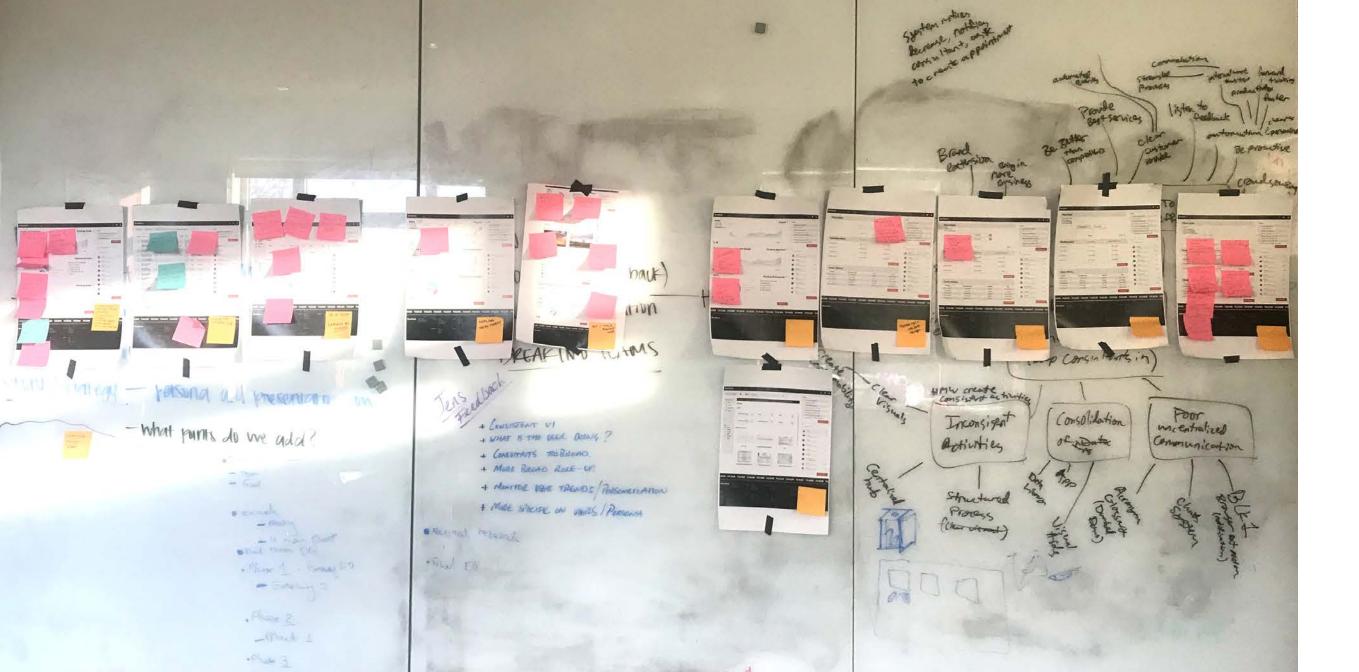






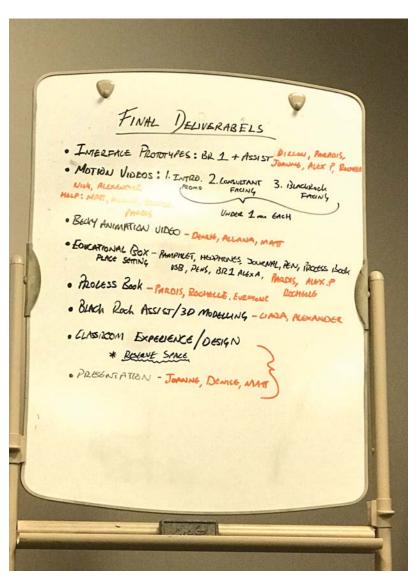


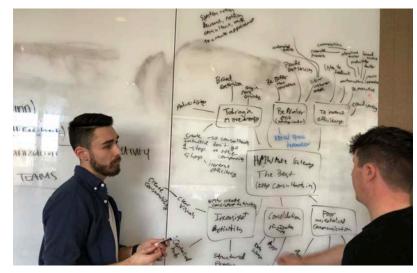




Final Deliverables In Process

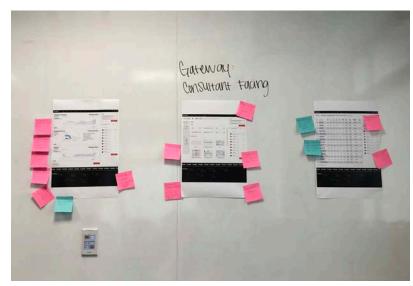
After the SCADPro team's presentation at BlackRock, they went straight back to work, refining, editing, and adjusting according to the feedback they had received. The consensus from the midterm presentation was overwhelmingly positive, minor changes to functionalital being the significant points. The team worked tirelessly, refining their work even further and incorporating even more innovative concepts for BlackRock. The following pages show the team's final deliverables in the works.

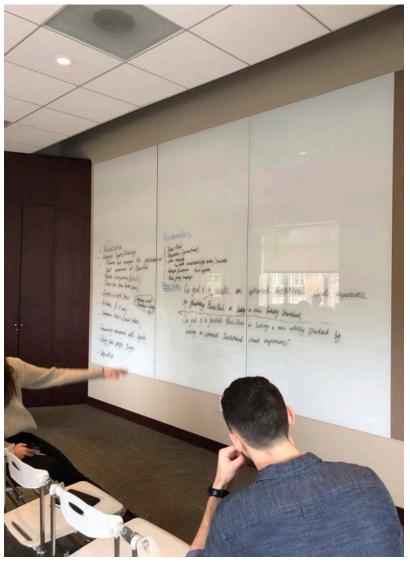


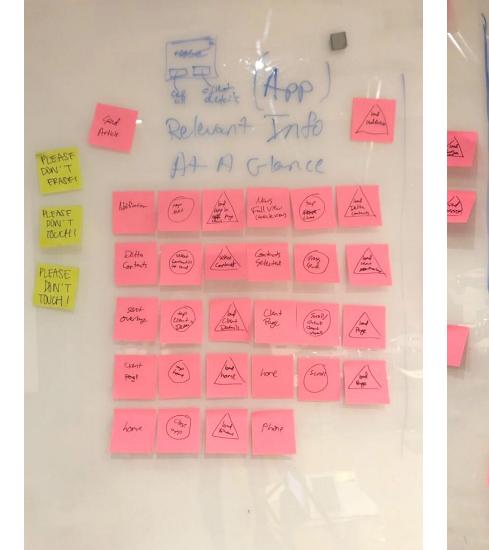


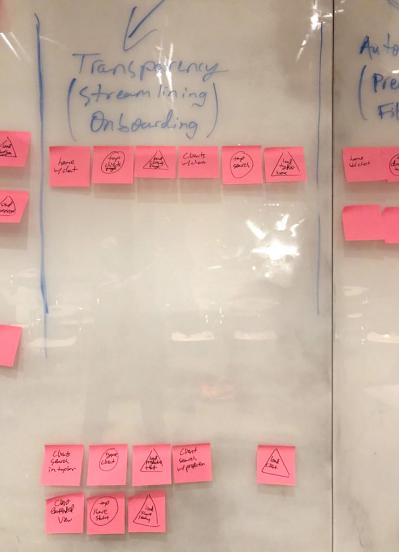








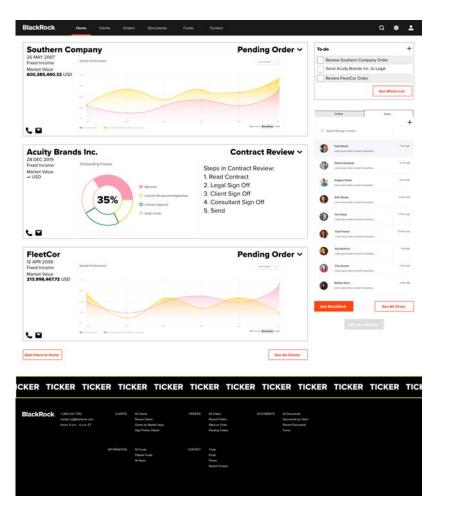






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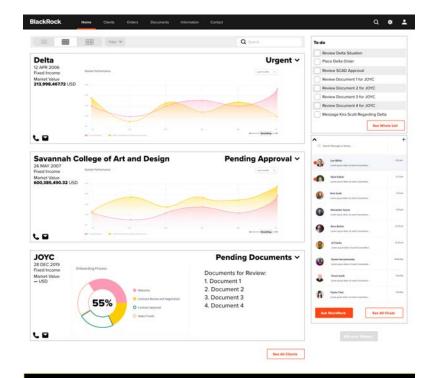
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BlackRock Assist is now integrated into the portal to help answer questions and sort through problems.

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IVV	iShares Core S&P 500 ETF	31.44	31.44	15.23	11.65	13.50	6.15	Dec 31, 2019	May 15, 2000	203,365M	+		[See Whole List
IEFA	Shares Core MSCI EAFE ETF	22.67	22.67	9.99	6.28		715	Dec 31, 2019	Oct 18, 2012	74,958M	+	-	Output	intere
AGG	Shares Core S&P 500 ETF	8.68	8.68	3.99	3.00	3.65	4.05	Dec 31, 2019	Sep 22, 2003	72,718M	+	0.94	ch Marage ar Name	
EFA	iShares Core U.S. Aggregate Bond ETF	21.94	21.94	9.50	5.61	5.41	5.40	Dec 31. 2019	Aug 14, 2001	63,180M	+		Part lines core part bits it and (monital	1
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ин	iShares Core S&P Mid-Cap ETF	26.14	26.14	9.20	8.96	12.61	9.31	Dec 31. 2019	May 22, 2000	52,041M	+	-	Eregary Payle	
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UR	iShares Core S&P Small-Cap ETF	22.79	22.79	8.37	9.55	13.31	9.95	Dec 31. 2019	May 22, 2000	46,704M	+	O	Neri Beg Leet gant blir ei and Canachter	- Charles
IWM	iShares Russell 2000 ETF US Class	25.42	25.42	8.56	8.24	11.83	8.03	Dec 31, 2019	May 22, 2000	43,959M	+	0	End Proofs Lover prob date of and Canadidat	17 march ag
IWD	iShares Russell 1000 Value ETF	26.34	26.34	9.51	8.11	11.59	7.04	Dec 31, 2019	May 22, 2000	40,434M	+	0	Nye Reistrika Laten quan Joint of and Linearity)	146.48
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LOD	iShares iBoxx \$ Investment Grade Corporate Bond ETF	17.13	17:13	6.50	4.84	5.93	5.73	Dec 31, 2019	Jul 22, 2002	35,356M	+	0	Bolhan Kirne Lanningsati bilan ol post "(crossible)	-1 then ap
EEM	iShares MSCI Emerging Markets ETF	17.67	17.67	10.92	4.99	2.85	10.60	Dec 31, 2019	Apr 07, 2003	28,687M	+	Ask B	lackRock	See All Chats
tvw	iShares S&P 500 Growth ETF	30.91	30.91	18.46	13.32	14.57	5.92	Dec 31, 2019	May 22, 2000	25,263M	+		And great Dise	
тоті	iShares Core S&P Total U.S. Stock Market ETF	30.87	30.87	14.55	11.31	13.36	8.92	Dec 31. 2019	Jan 20, 2004	25,015M	+			

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gateway2.0 Consultant view, Funds





BlackRock One Consultant view, Home

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Al Documents Documents by Client Recent Documents Forms Popular Documents Documents for You

BlackRock One Consultant view, Documents Documents are automatically organized by client and category and give the

by client and category and give the user the option to view them in different formats.

ocument Type	Savannah College of Art and Design ASL Lis	t needs to be updated - last update 02/04/2019	To-do list Delta point 1
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Calendar full view, day







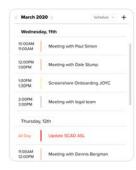
Calendar, week





Calendar, month

Calendar, schedule



Calendar,

The user has the ability to toggle between their calendar and to do list so they don't forget appointments, meetings, or important deadlines.

Calendar full view, week

Calendar full view, month

Calendar full view, schedule

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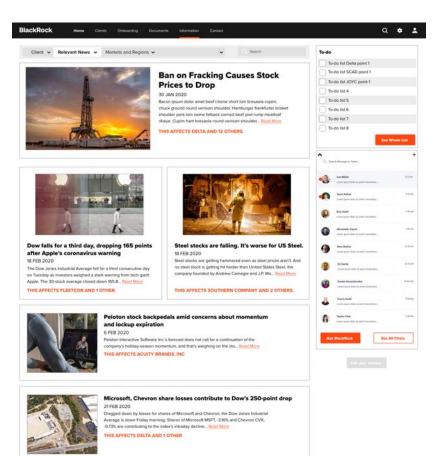
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IVV	Shares Core SEP 500 ETF	31.44	31,44	15.23	11.65	13.50	6.15	Dec 31, 2019	May 15, 2000	203,365M	+	To-do list 4	
IEFA	Shares Core MSCI EAFE ETF	22.67	22.67	9.99	6.28	\overline{a}	715	Dec 31, 2019	Oct 18, 2012	74,958M	+	To-do list 6	
AGG	IShares Core S&P 500 ETF	8.68	8.68	3.99	3.00	3.65	4.05	Dec 31, 2019	Sep 22, 2003	72,718M	+	To-do list 8	See Whele Lie
EFA	iShares Core U.S. Aggregate Bond ETF	21.94	21.94	9.50	5.61	5.41	5.40	Dec 31. 2019	Aug 14, 2001	63,180M	+	C. back heap a laws.	
IEMG	iShares Core MSCI Emerging Markets ETF	17.50	17.50	11.09	5.37	-	3.73	Dec 31, 2019	Oct 18, 2012	59,583M	+	Letter	
ин	iShares Core S&P Mid-Cap ETF	26.14	26.14	9.20	8.96	12.61	9.31	Dec 31. 2019	May 22, 2000	52,041M	+	The state	
IWF	iShares Russell 1000 Growth ETF	36.08	36.08	20.25	14.42	15.00	5.37	Dec 31, 2019	May 22, 2000	50,237M	+	C Riss South	
UR	iShares Core S&P Small-Cap ETF	22.79	22.79	8.37	9.55	13.31	9.95	Dec 31. 2019	May 22, 2000	46,704M	+	Anaander Zayne	
IWM	iShares Russell 2000 ETF US Class	25.42	25.42	8.56	8.24	11.83	8.03	Dec 31, 2019	May 22, 2000	43,959M	+	Institute	
IWD	iShares Russell 1000 Value ETF	26.34	26.34	9.51	8.11	11.59	7.04	Dec 31, 2019	May 22, 2000	40.434M	+	Atlata	
JSMV	iShares Edge MSCI Min Vol USA ETF	2777	2777	15.50	12.43	-	14.62	Dec 31, 2019	Oct 18, 2011	38,220M	+	Contraction of the second	water.
LOD	iShares iBoxx \$ Investment Grade Corporate Bond ETF	1713	1713	6.50	4.84	5.93	5.73	Dec 31, 2019	Jul 22. 2002	35,356M	+	B Texts South	
EEM	iShares MSCI Emerging Markets ETF	17.67	17.67	10.92	4.99	2.85	10.60	Dec 31, 2019	Apr 07, 2003	28,687M	+	Taylor Chai	
IVW	iShares S&P 500 Growth ETF	30.91	30.91	18.46	13.32	14.57	5.92	Dec 31, 2019	May 22, 2000	25,263M	+	Ask BlackRock	See All Chats
тот	iShares Core S&P Total U.S. Stock Market ETF	30.87	30.87	14.55	11.31	13.36	8.92	Dec 31, 2019	Jan 20, 2004	25,015M	+	fich ree	

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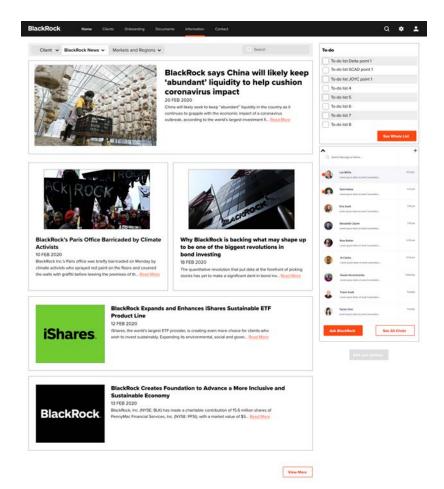


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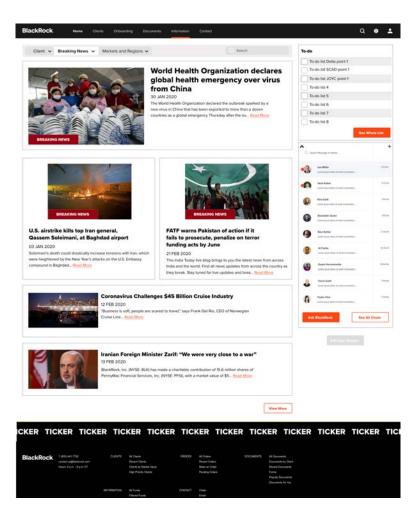


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Relevant News



BlackRock News



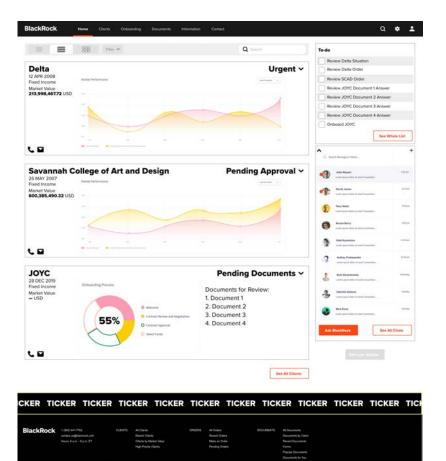
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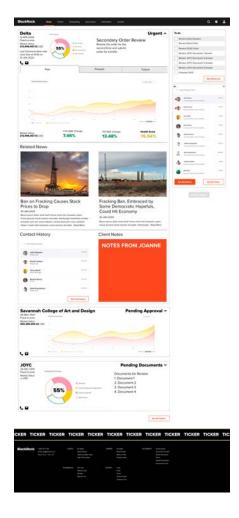
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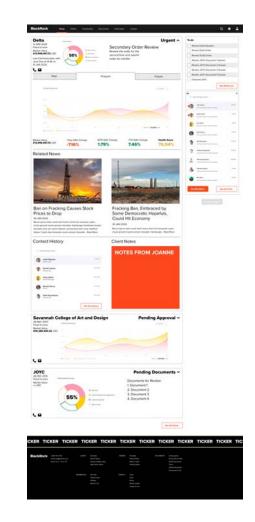
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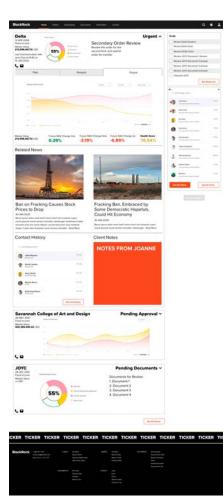
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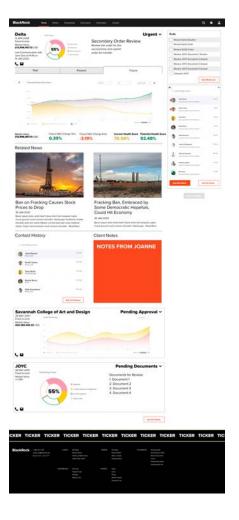
BlackRock view, Home extended 1

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BlackRock view,

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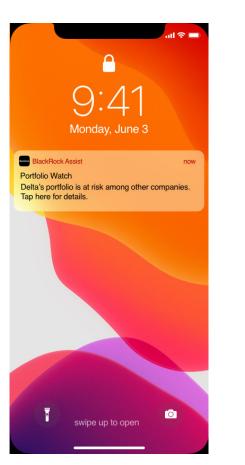
BlackRock One BlackRock view, Home extended 3

BlackRock One BlackRock view, Home extended 4

Mobile

To ensure consultants and BlackRock representatives are prepared for their day and aware of urgent matters, the team created an app for outside the office.

Both sides can view their clients, see relevant news, use the messaging system, view their calendar, and utilize BlackRock Assist.



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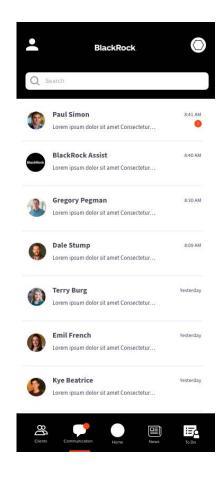
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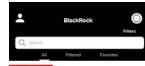






News

Clients Filter





Ban on Fracking Causes Stock Prices to Drop 30 JAN 2020

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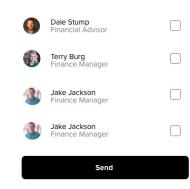
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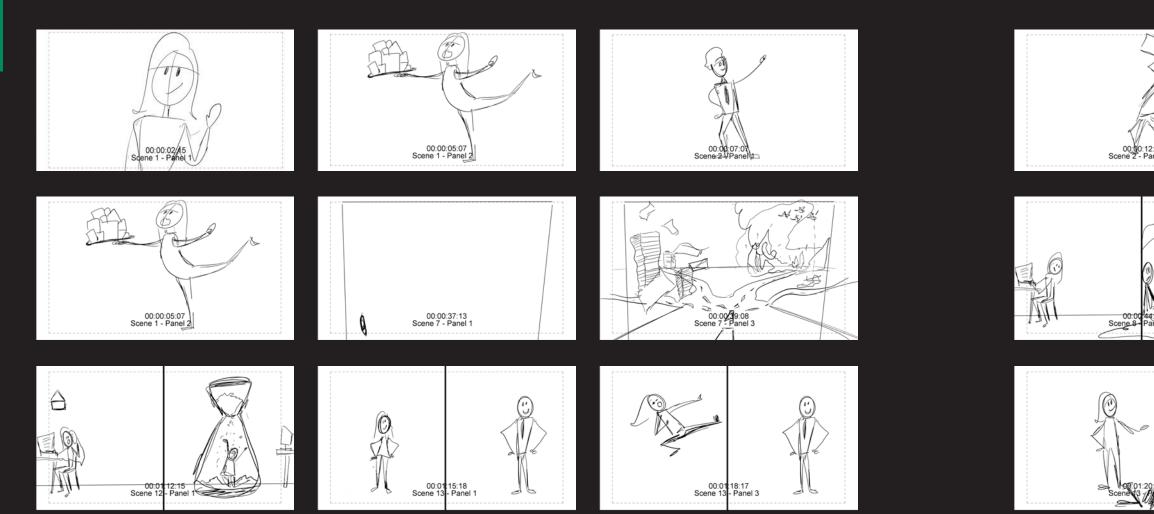


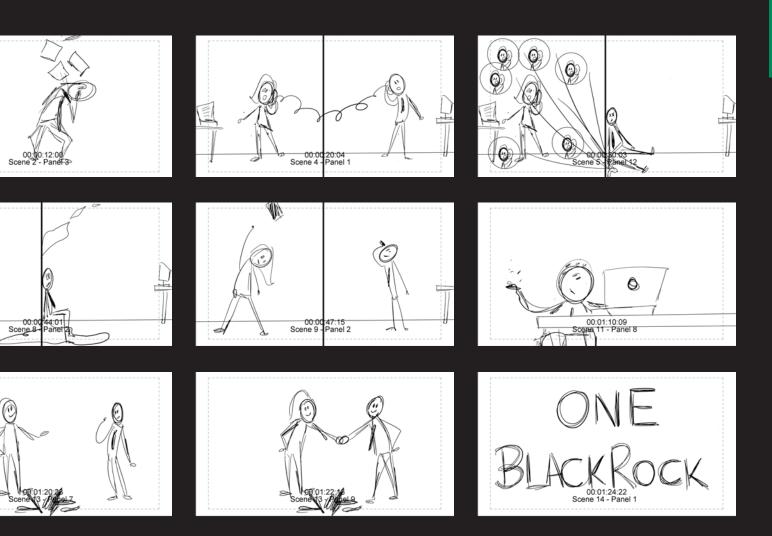
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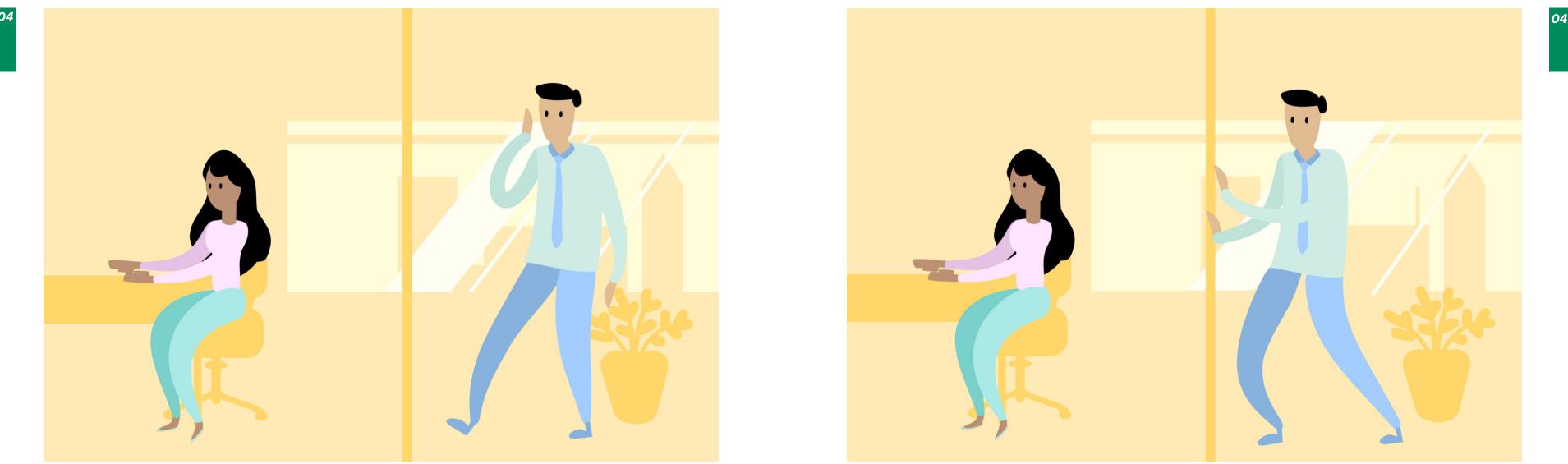
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10:00 AM 11:00 AM	Meeting with Paul S	Simon
12:00 PM 1:00 PM	Meeting with Dale \$	Stump
1:00 PM 1:30 PM	Screenshare Onbo	arding JOYC
2:00 PM 3:00 PM	Meeting with legal t	eam

To Do

News Send







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