

AS Capstone Project Proposal

Summer 2025

Project Name: Fiduciary Accounting Software

Team Members: Cooper Graves & Paige Leon

July 16, 2025

Project Description

We propose creating web-based software to assist with fiduciary accounting and the creation of relevant documents. This software will be a secure and cost-effective productivity tool mainly for conservators to streamline client accounting. Similar software on the market does not properly provide for the needs of conservators and is primarily meant for estates and trusts. The simplicity of transaction entry and management will allow for easy creation of professional documents for the probate court.

Functionality

The software will have the following functions and features:

- Importing of transactions through .csv files
- Formatted PDFs of output reports
 - Multiple preset layouts
 - Fill probate forms
- Keyboard shortcut functionality
- Custom groups for transactions
- Robust search options
 - Within date range
 - By groups
 - By bank account
 - By transaction details
- Secure storage of sensitive client information
- Can be hosted on a local server

- Saved mailing certification
- Single client management

Development Platform

We will be creating web-based software using PHP and managing data with a MySQL database. Portability is a desirable feature when using PHP as opposed to software made with C# or other languages. Furthermore, PHP is more streamlined and readable than ASP.NET and will allow for easier future updates and development. PHP can be hosted on a local network to maintain secure record keeping; this will also keep hosting costs at a minimum.