



CS 495: Budgeting Mobile App

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About Accutech

Company dealing in estates, inheritances and trusts

Banking and portfolio investments put on trust

Creates financial plans for clients

Deals with wealthy clientele



First Meeting

All productive talk.

Rarely went off topic.

Only conflict was elaborating the inability to develop a IOS counterpart; agreed on Android

Collaborated for four fundamental functions they would like to see.

They gave us a sequence of screens for what they want the application to have.



Observations

Very reserved expectations of the application.

Seemed somewhat adamant on having a IOS version of the application

There may be some problem getting in contact with our liaison

Mr Trammel is located in Denver and must be reached through Mr Wright



Notes for next Meeting

Discussion on how they want the application on a technical side.

We will show a android version of the application and will get further validation of whether to continue with the Android approach or to reconsider a web based application.

Get a more detailed list of possible variables for additional info or in turn



The Application

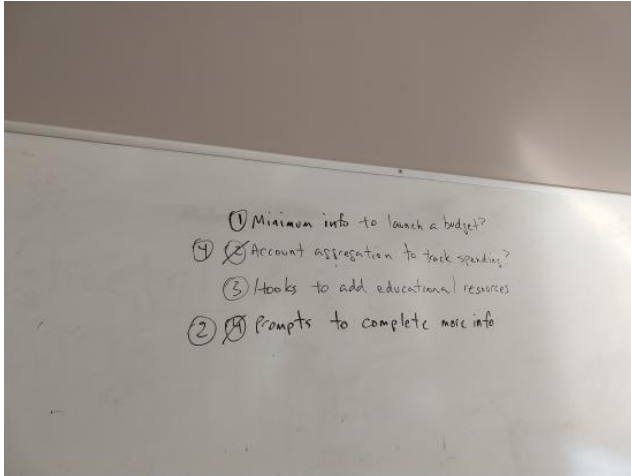
Prompted by acquisition of MoneyTree.

Want to reach a lower income clientele

Ideal demographic would be us, people who just started saving

Our software will act as a skeleton for further inhouse development

Four Fundamental Feature



1. Minimum info to launch budget
2. Prompt to complete more info for better budget.
3. Develop/ hook in educational resources for field terminology
4. Account integration to extensively track spending



Tech Stack

Everything will have to be done by us as our application will be the foundation for additional development

We will be using Java Via Android Studio.



First Iteration

First Iteration will be to create minimum info based budget launching app.

This will require the most fundamental variables the client can put up;

- Income
- Food
- Rent
- Utilities

Further Iterations will be based around the four fundamental features and tackling each of them in order.

Model

