



# eFinPlan

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# Client

- Matthew Garrett
- Moneytree (owned by Accutech)
- Patrick Spencer



# Mentor Feedback

- Make sure to test frontend
  - Make sure to put the Investor's name next to a submitted survey
  - Add tooltip for certain words
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- Overall really impressed with our work, doesn't have much else to say
    - Clients may have some suggestions

# Client Feedback

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- Wanted progress bar for questions and requested us to store responses on our own backend rather than theirs
- Were scared that users could leave without finishing if there was no question count
- Noticed that answers didn't save when going back to older questions
- Praised our work
- Said we nailed the presentation of the questions

# Iteration 4

## Features

# Planning Has Pagination

eFinPlan

Content Appointments Planning Log Out

Financial Planning

Question 1 of 7 →

Are you married?

☒ Yes ☐ No

# Conditional Questions

Are you married?

☒ Yes ☐ No

What is your spouse's name?

What is your spouse's date of birth?



Is your spouse retired?

☐ Yes ☐ No

# Viewing Previous Surveys

test2 test2, March 22

Question 1 of 7 → ✕

Are you married?

☒ Yes ☐ No

What is your spouse's name?

What is your spouse's date of birth?

mm / dd / yyyy

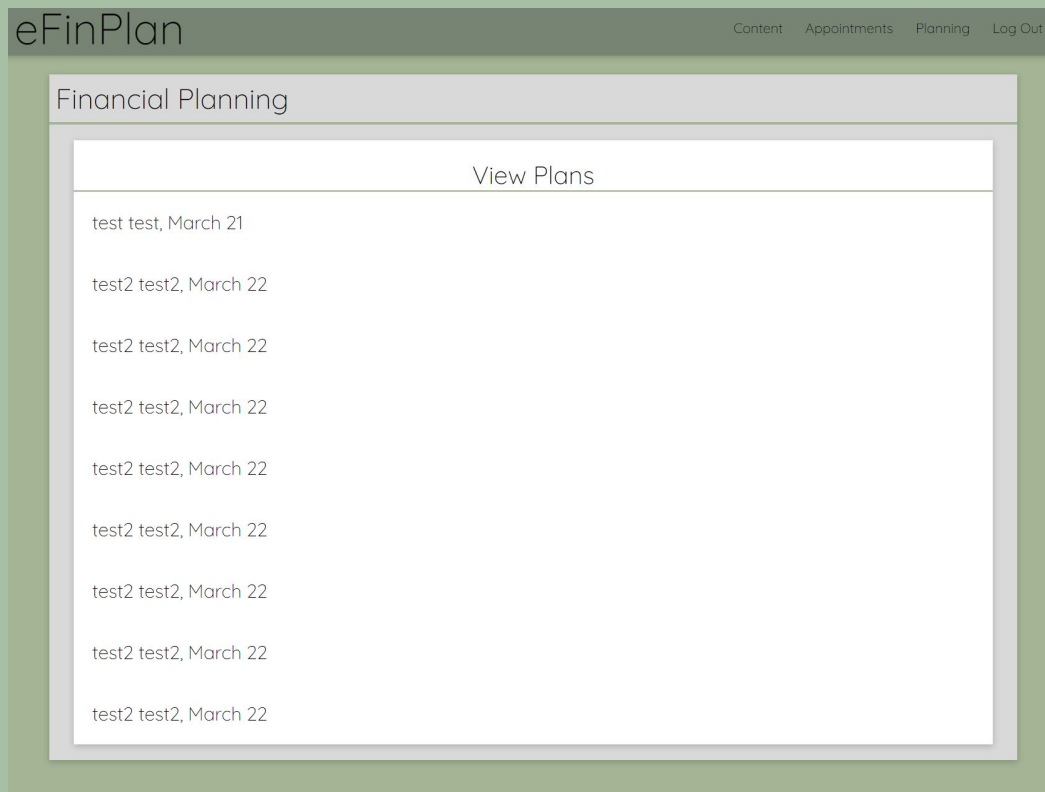
Is your spouse retired?

☐ Yes ☐ No

Fill Out New Form



# Advisors Can View All Surveys



# Appointment Information Deferred to Advisors

Please Fill Out The Information Below To Finish Your Request:

Appointment Start Time:  

Duration of Appointment (In Minutes):

Description:

Description:

Meeting Link:

File:

## Benefit to Client

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- MoneyTree now have a stylish system for Investors to view content, create financial plans by documenting their finances, and contact Advisors for appointments
- This iteration specifically allows Investors to document their finances, which can be viewed by an Advisor, who can now add specific points to meeting that they accept with Investors
- Prior to this, MoneyTree had no way for Investors to make a simple financial plan, nor for Advisors to address concerns with plans
- Completes user flow
- Releasing right now would be fully functional and useful for the client and their users

# Plans for Iteration 5

The screenshot shows the 'eFinPlan' web application. At the top, there is a dark green header with the 'eFinPlan' logo on the left and navigation links 'Content', 'Appointments', and 'Planning' on the right. Below the header is a light gray section titled 'Your plan'. Inside this section, there is a white box containing a form. The form has an 'Inflation rate:' label with a text input field showing 'ex. 1,000,000'. Below this, there are two columns: 'Starting age' and 'Starting \$' on the left, and 'Target age' and 'Goal \$' on the right. Each of these four labels has a green star icon below it. A horizontal line separates the form fields from a block of Lorem ipsum placeholder text at the bottom of the white box.

Financial Plan Graphs  
FR 34-36

*Vestorly*

Vestorly Connection  
FR 2-5 (Updated)

THEY PAY ME IN  
**WOIMS**

