



# eFinPlan

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# Client

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



# Mentor Feedback

- Add tag suggestions to Add/Edit content page
  - This was added
- Make advisors only edit or delete content they've made
  - This was added
- Front end looks good
- Good use of .NET Identity

# Client Feedback

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- Calculators needed to be styled, and possibly moved to their own pages
- Will send us information about calculator issues
  - The retirement calculator is not listed on their documentation
- In the future, login will be invite based and use AMember
- Wants us to work on appointments next

# Iteration 2

## Features

# Registration

# eFinPlan

Welcome to eFinPlan.

Create an account to view curated content, access financial planning, and create appointments with financial advisors.

## Create an account.

First Name

Last Name

Email

Password

Must be between 6 and 15 characters and include a lowercase letter, an uppercase letter, a number, and a special character.

Confirm Password

Role

Investor

Register

Already have an account? [Log in here.](#)

# Log In

eFinPlan

Welcome back.

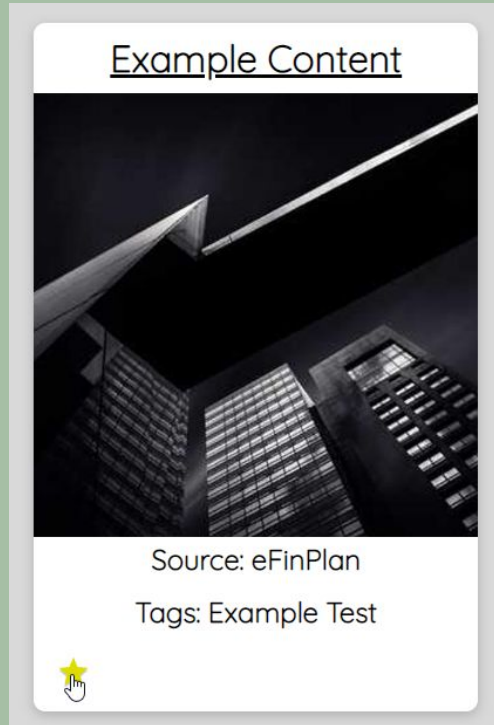
Email

Password

Log In

Don't have an account? [Sign up here.](#)

# Favorite Content





# Filter Content by Favorites

eFinPlan


ContentAppointmentsPlanningLog Out

View curated content.

Search content..


Favorites

Example Content



Source: eFinPlan

Tags: Example Test




# Search Content by Tag or Name

eFinPlan

ContentAppointmentsPlanningLog Out

View curated content.

Example Content



Source: eFinPlan

Tags: Example Test

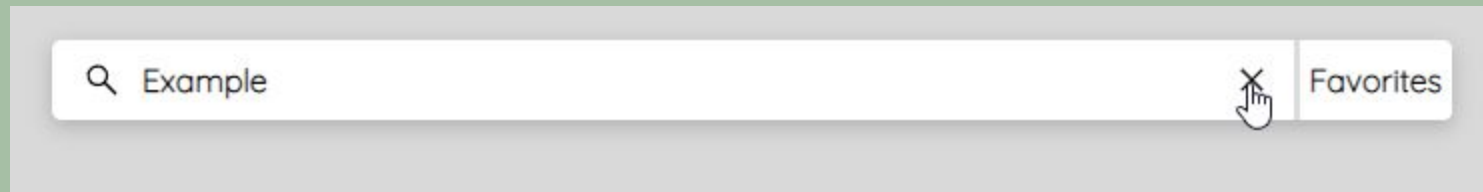
★

Example

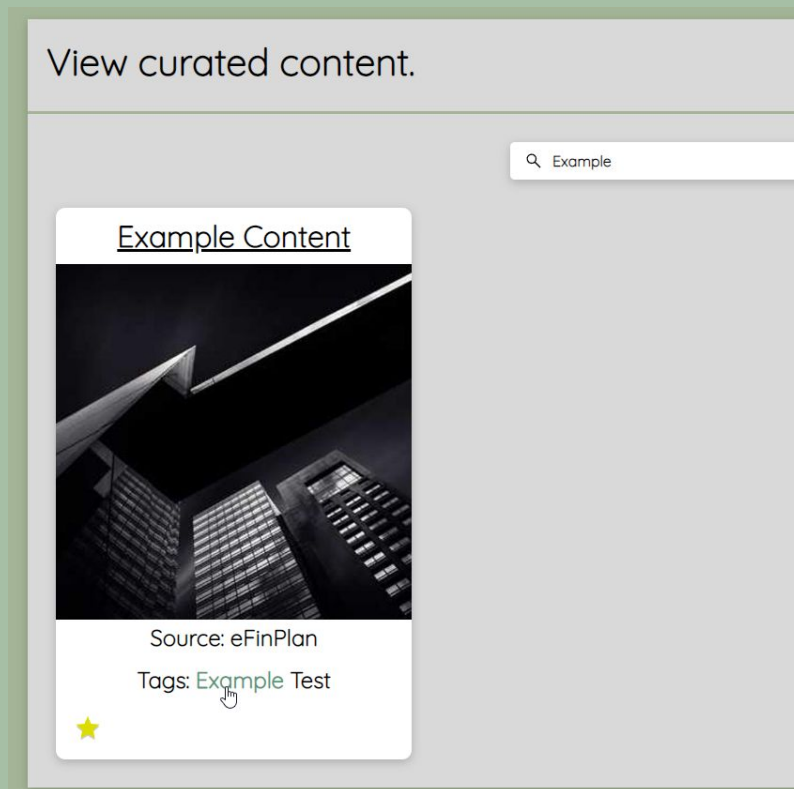
×

Favorites

# Clear Search



# Search by Clicking on a Tag



# Tag Suggestions

eFinPlan


ContentAppointmentsPlanningLog Out

View curated content.

Example

Example

Example Content




Source: eFinPlan

Tags: Example Test

★

Mock Content



Source: eFinPlan

Tags: Mock Test

☆

# Tag Suggestions on Content Add/Edit



# Advisor Can Only Edit Content They Added

eFinPlan


ContentAppointmentsPlanningLog Out

View curated content.

Add


Search content...

Example Content




Source: eFinPlan  
Tags: Example Test

Mock Content



Source: eFinPlan  
Tags: Mock Test

Fake Content



Source: eFinPlan  
Tags: Fake Mock

EditDelete

# Education Calculator

## Education Calculator

Education Cost Parent Percentage

0.00 %

Education Expense Inflation Rate

0.00 %

Education After Tax Earning Rate

0.00 %

Education Deducted From Retirement

### Dependents

First Name

John

Last Name

Doe

Birthday

mm/dd/yyyy

First Year of College

2025

Number of College Years

0

Annual College Cost

\$ 0

Available Funds

\$ 0

Monthly Additions

\$ 0

Dependent Till Age

0

Add Dependent

Submit



# Financial Goals Calculator

## Financial Goals Calculator

Name:

New Car

Age:

0

Amount:

\$ 0

Inflation Rate:

0%

Start Age:

0

Note:

Notes

Add Financial Goal

Submit

# Social Security Calculator

## Social Security Calculator

### Incomes

Income Type Code
Individual 1 Salary
Pre-Retired Annual Amount
0
Pre-Retired Increase Rate
0
Pre-Retired Cash Flow Amount
0
Pre-Retired Disability Amount
0
Pre-Retired Survivor Amount
0
Retired Annual Amount
0
Retired Increase Rate
0
Retired Cash Flow Amount
0
Retired Disability Amount
0
Retired Survivor Amount
0
Full Retirement Age Social Security Benefit
0
Add Income

Individual 1

First Name

John

Last Name

Doe

Birthday

mm/dd/yyyy

Individual 2

First Name

John

Last Name

Doe

Birthday

mm/dd/yyyy

Current Age

0

Birthday

mm/dd/yyyy

Retirement Age

0

Life Expectancy

0

Current Age 2

0

Birthday 2

mm/dd/yyyy

Retirement Age 2

0

Life Expectancy 2

0

Submit

# Calculator Results

Click to view results.

Description: asdf

Age Needed: 0

Inflation Rate: 0

Amount Needed: 0

Inflated Amount Needed: 0

Lump Sum Deposit: 0

Monthly Deposit: 0

Financial Goal Investment Rate of Return: 0

# Plans for Iteration 3

[illegible]

# Appointment Creation

## FR23-26

```
graph LR; A[eFinPlan] --> B[Content]; A --> C[Appointments]; A --> D[Planning]; B --> E[Your plan]; E --> F[Inflation rate: ex. 1,000,000]; F --> G[Starting age Starting $]; F --> H[Target age Goal $]; G --> I[Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum]; H --> I;
```

The diagram illustrates a financial planning process. It begins with a dark green header bar containing the 'eFinPlan' logo and three navigation links: 'Content', 'Appointments', and 'Planning'. Below this is a light grey bar with the title 'Your plan'. The main content area is white and features a flowchart. A box labeled 'Inflation rate: ex. 1,000,000' points to two parallel paths: 'Starting age Starting \$' and 'Target age Goal \$'. Both paths lead to a large text block containing a placeholder Lorem Ipsum paragraph. A horizontal line separates the inflation rate box from the text block.

# Planning

## FR34-36



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