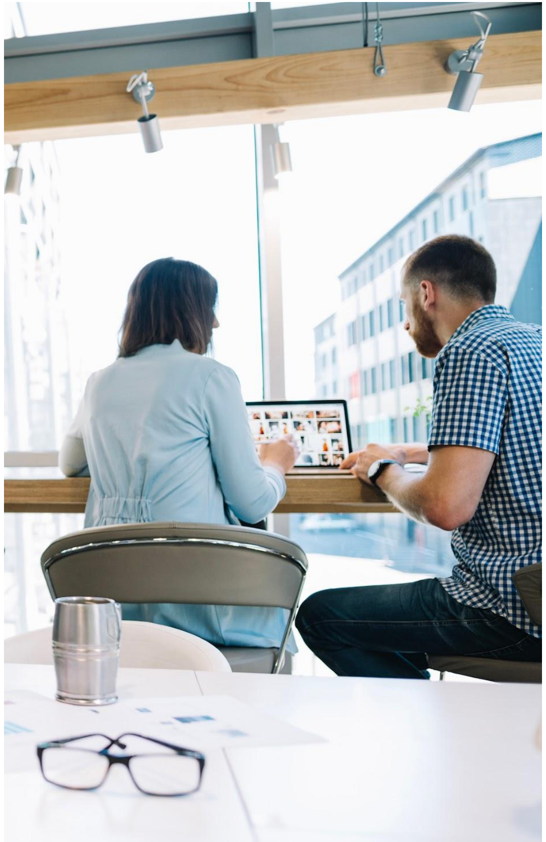


eFinPlan

Jared Brown, Joah De Vries, Noah Perez, and Desirée Nelson

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

- Overall really impressed with our work, doesn't have much else to say
    - Clients may have some suggestions

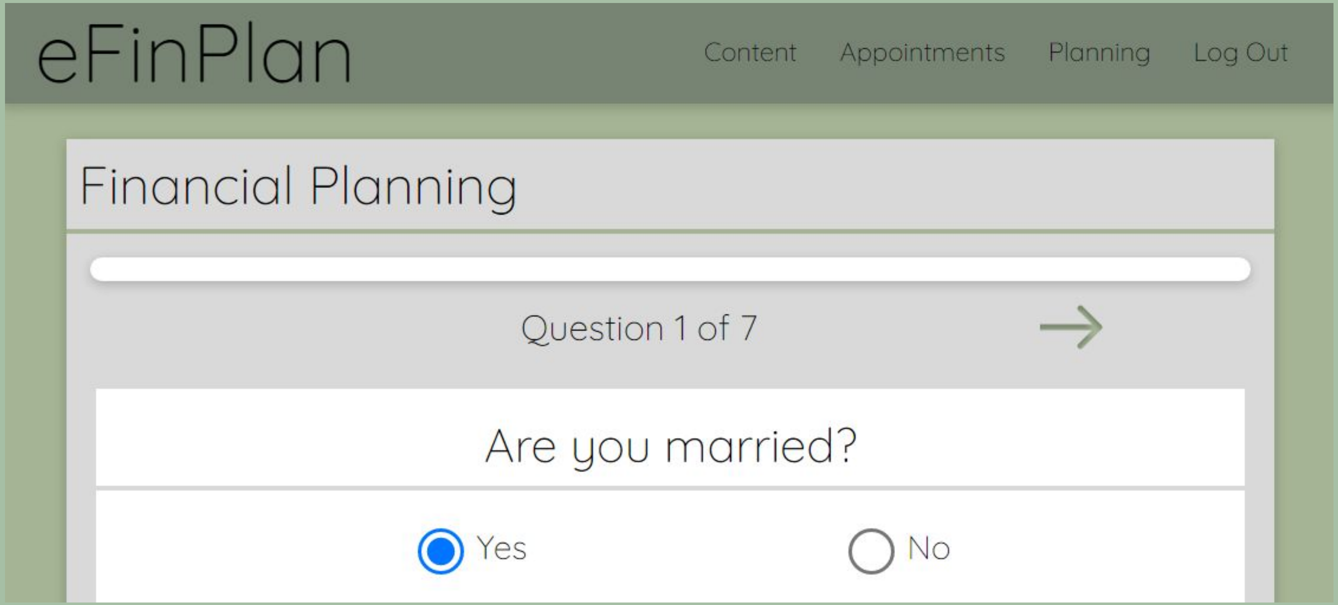
Client Feedback

- 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

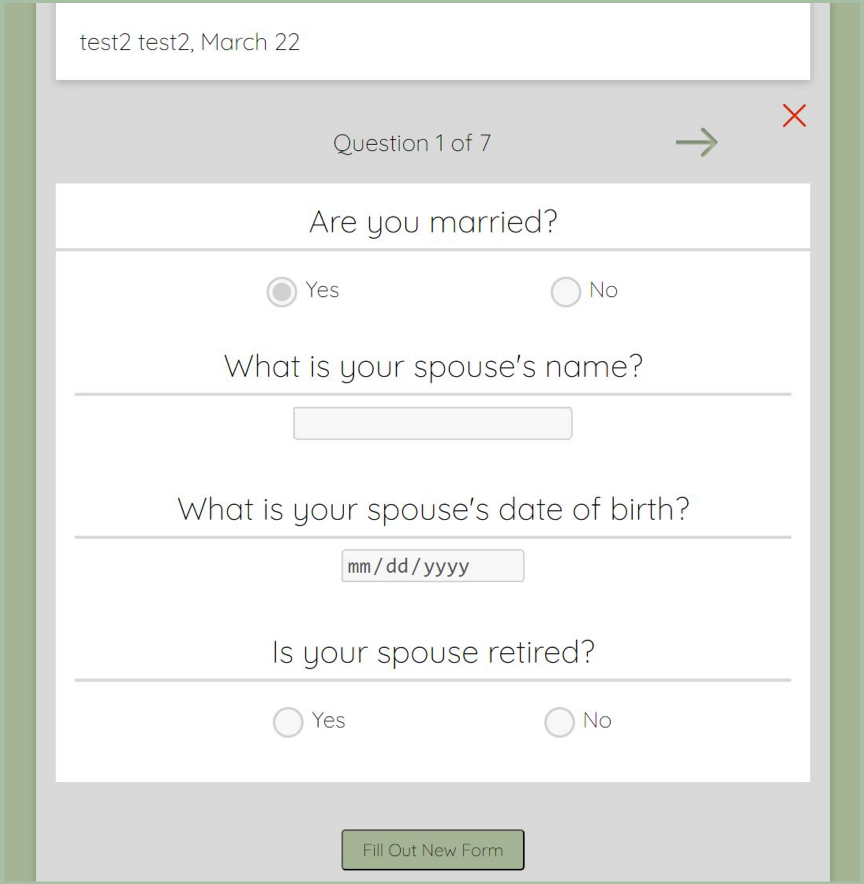
Iteration 4 Features

Planning Has Pagination

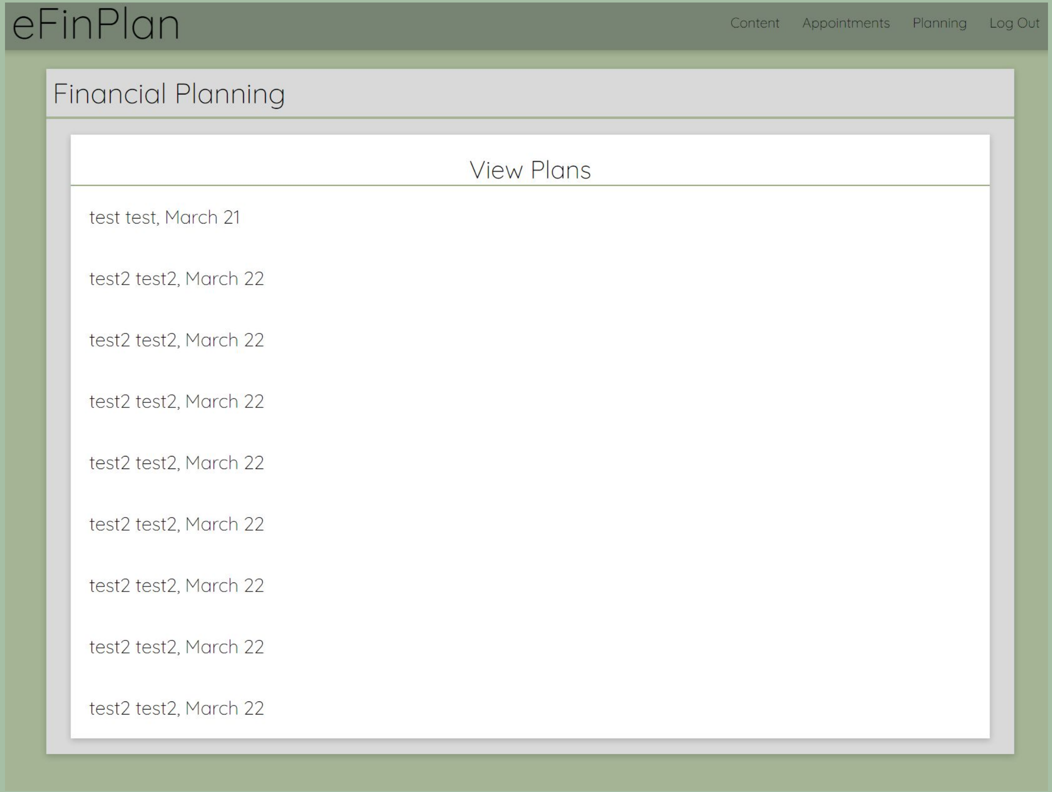


Conditional Questions

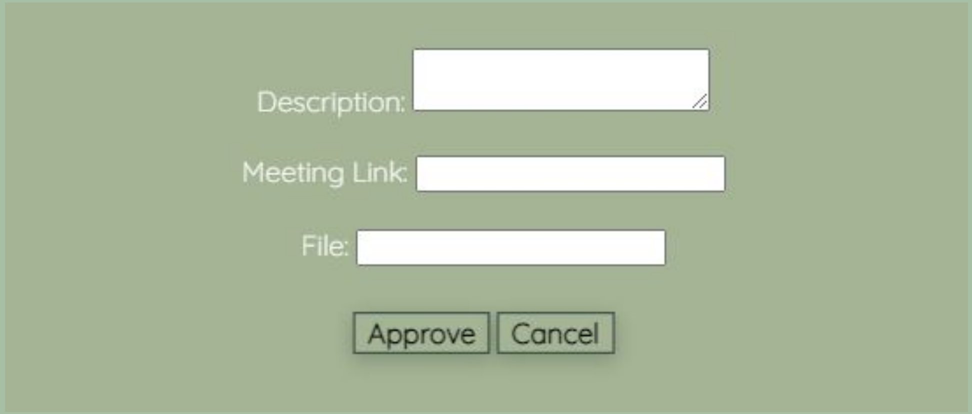
Viewing Previous Surveys



Advisors Can View All Surveys



Appointment Information Deferred to Advisors



Benefit to Client

- 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

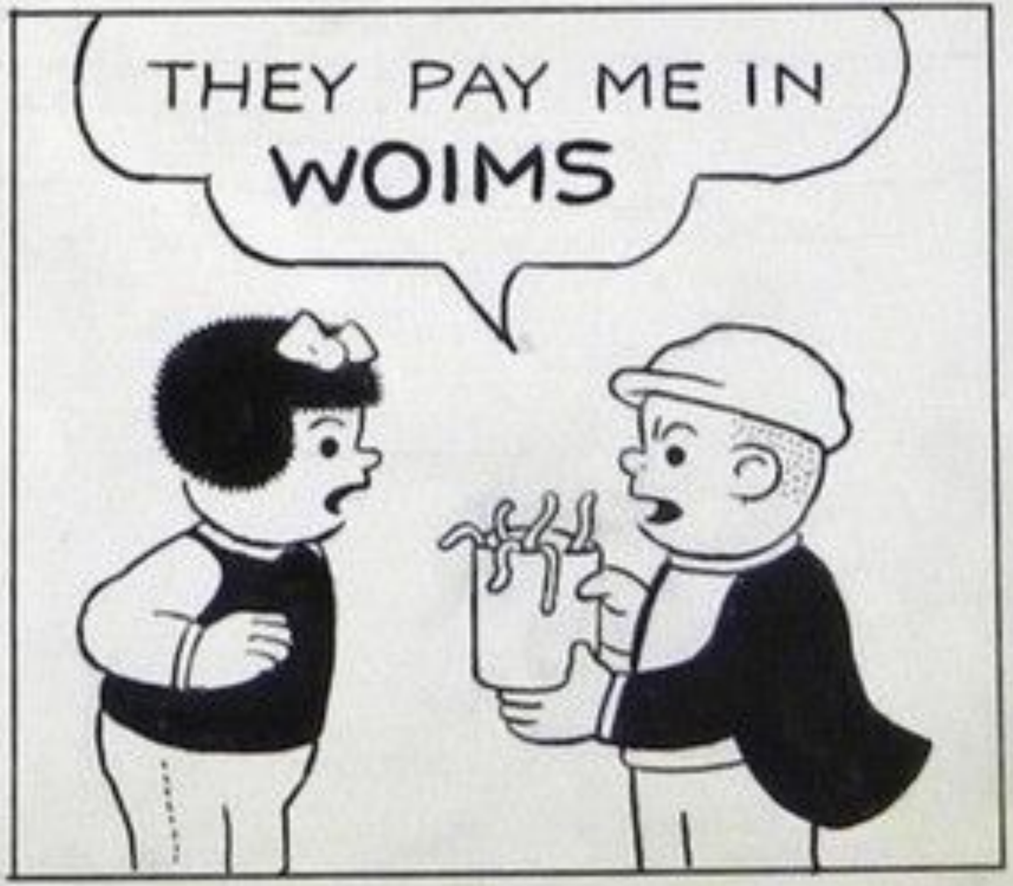
Financial Plan Graphs

FR 34-36

Vestorly

Vestorly Connection

FR 2-5 (Updated)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