



eFinPlan

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Client

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



Mentor Feedback

- Told us to up the size for the graphs
- Also told us more minor details to change dealing with the graphing and analysis
- Says accessibility is great and is really aligned with Accutechs accessibility standards
- Said it was better than some of Accutechs own software

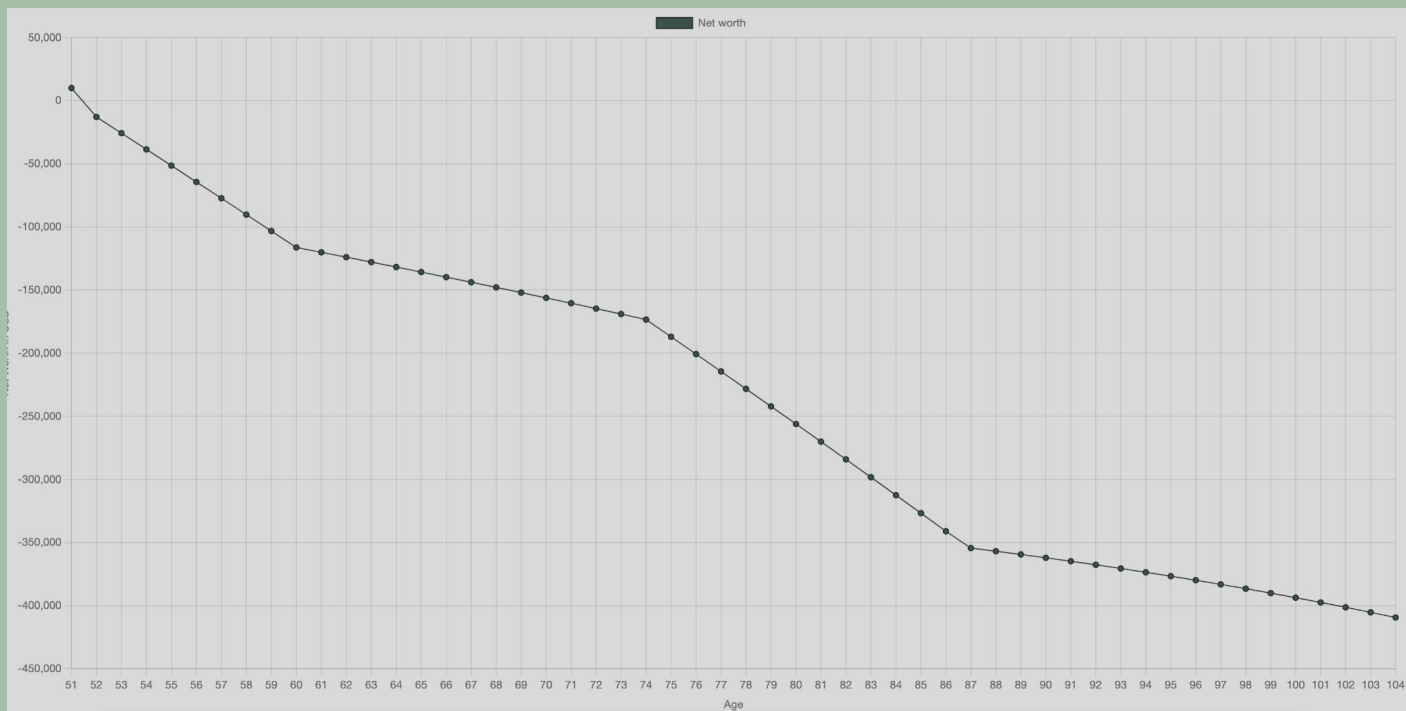
Client Feedback

- They liked the UI
- Wants the x-axis on the graph to represent the investors age rather than just years in advance
- Very Impressed with the accessibility coverage from Google Lighthouse
- Glad we were able to incorporate all their requested questions
- Liked how we organized the graphing and feedback aspects

Iteration 5

Features

Graphing





Questionnaire Response

Tips:

You should increase your annual capital gains by 25% to prevent financial losses during retirement.

Accessibility

 http://localhost:8080/content



Accessibility

These checks highlight opportunities to [improve the accessibility of your web app](#). Only a subset of accessibility issues can be automatically detected so manual testing is also encouraged.

ADDITIONAL ITEMS TO MANUALLY CHECK (10)

Show


These items address areas which an automated testing tool cannot cover. Learn more in our guide on [conducting an accessibility review](#).


PASSED AUDITS (17)


Show


NOT APPLICABLE (27)


Show


 Captured at Apr 19, 2023, 8:01 AM EDT

 Emulated Desktop with Lighthouse 9.6.8

 Single page load

 Initial page load

 Custom throttling

 Using Chromium 109.0.0.0 with devtools

Generated by **Lighthouse 9.6.8** | [File an issue](#)

Benefit to Client

- MoneyTree now have a stylish system for Investors to view content, create financial plans by documenting their finances, to receive feedback from MoneyTree's API, and contact Advisors for appointments. It is also accessible to those with visibility issues.
- This iteration specifically allows Investors to see the financial plans provided by MoneyTree in a chart for a clear view of their financial future. It adds screen reader support as well.
- Prior to this, MoneyTree had no way for Investors to receive feedback on their financial plans without meeting with Advisors.
- Releasing right now would be fully functional and useful for the client and their users, and the accessibility addition prevents lawsuits and obviously helps people who need such accommodations.

