

eFinPlan

Client and Purpose

eFinPlan is a financial planning website made for MoneyTree. It allows Investors to document their finances, set up meetings with Advisors, and view curated financial planning content. Advisors can add to the library of content, review the finances of Investors, and set up times that they are available to meet with Investors. In a time where only a third of Americans have a financial plan, eFinPlan makes it easier for financial investors to create solid goals for the future.

Features

- Create and view curated financial planning content
- Tag content with relevant keywords
- Favorite and search content
- Set availability for meeting times
- Schedule meetings between Investors and Advisors
- Document finances in a financial planning survey

Tech Stack

- Vue 3
- Vite
- Vitest
- .NET Framework
- Xunit
- PostgreSQL
- Docker
- BitBucket
- Visual Studio
- WebStorm

View curated content.

Example Content

Mock Content

Source: eFinPlan

Tags: Example Test

Source: eFinPlan

Tags: Mock Test

View your appointments.

Approved Appointments

2/8/2023 9:47 PM 10 Minutes Cancel

Financial Planning

Question 1 of 7

Are you married?

Yes

No

Team Members

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

MoneyTree

MoneyTree Software is a subsidiary of Cheetah Inc. in Muncie, Indiana. It creates software to both support financial advisors and assist investors in making smart financial plans and decisions.

Acknowledgments

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- MoneyTree Contact: Matthew Garrett
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Conclusion

Throughout both semesters of development, eFinPlan has been paramount in improving the planning, learning, coding, and designing skills of all of us. Each member of eFinPlan intends to pursue a career in software development after graduation. Due to the help from MoneyTree and our mentors, we feel more confident about our abilities and have found areas to improve in, such as time management. Therefore, working on eFinPlan has made us more prepared for the workforce.