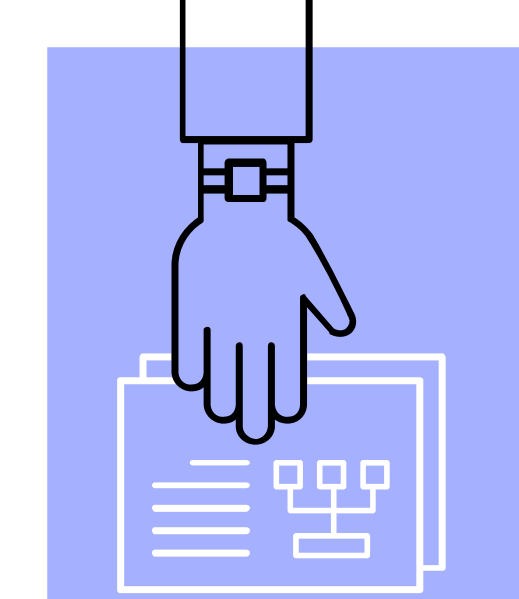
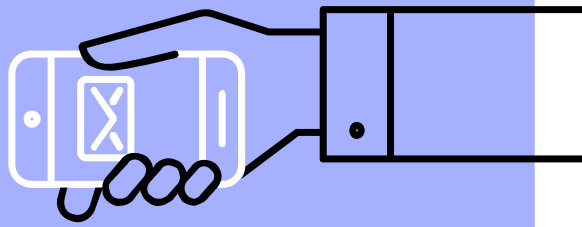
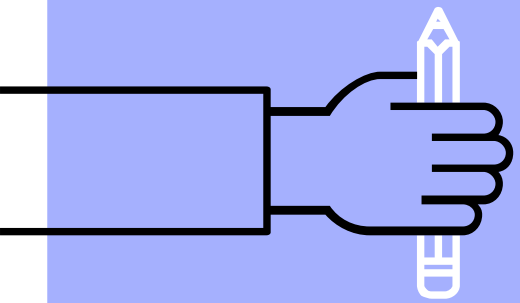
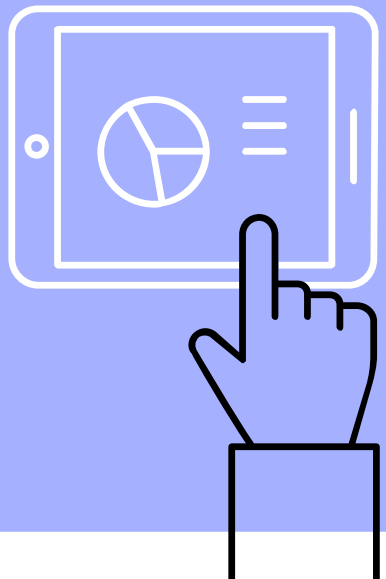




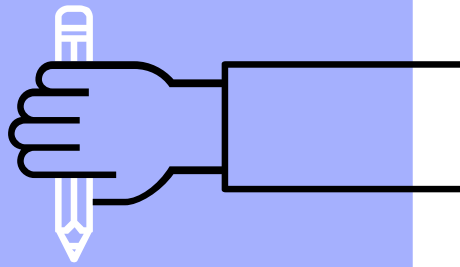
Iteration 1
eFinPlan

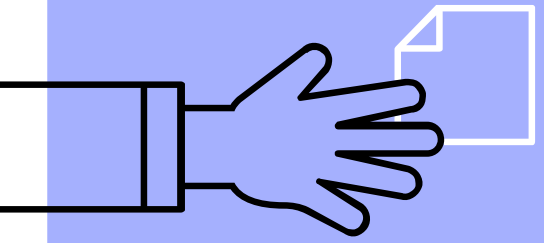


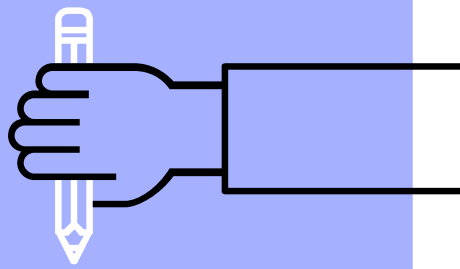


Team members:

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

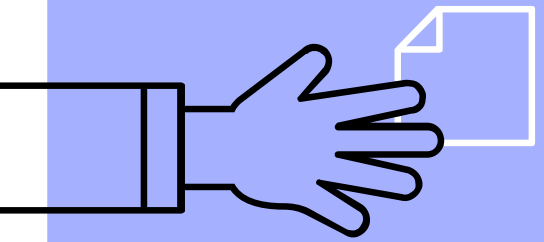






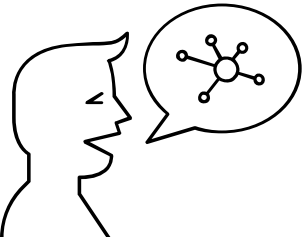
Client:

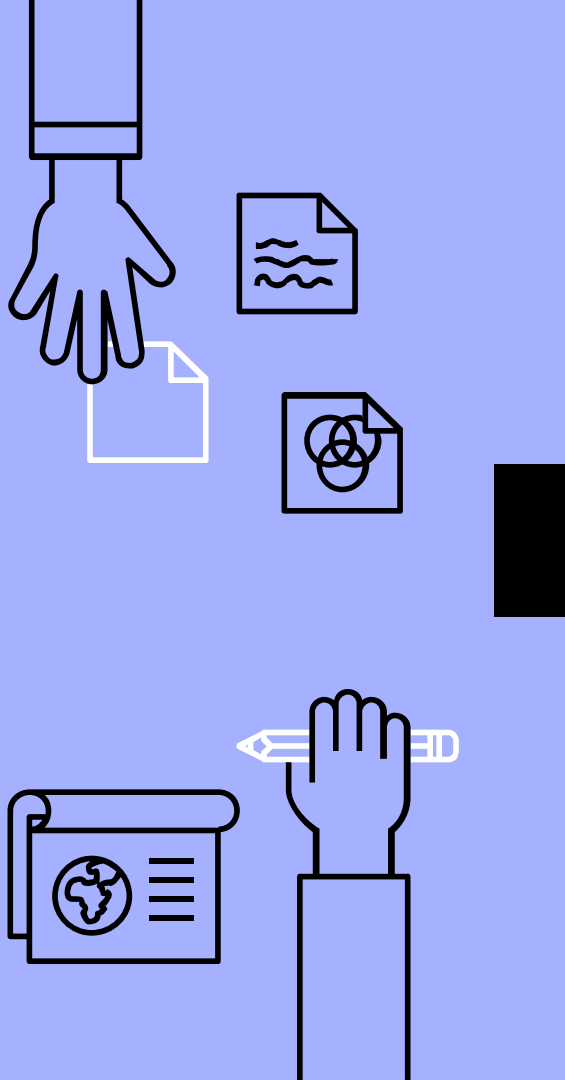
- Matthew Garrett
- Moneytree (owned by Accutech)
- Patrick Spencer



Mentor Feedback

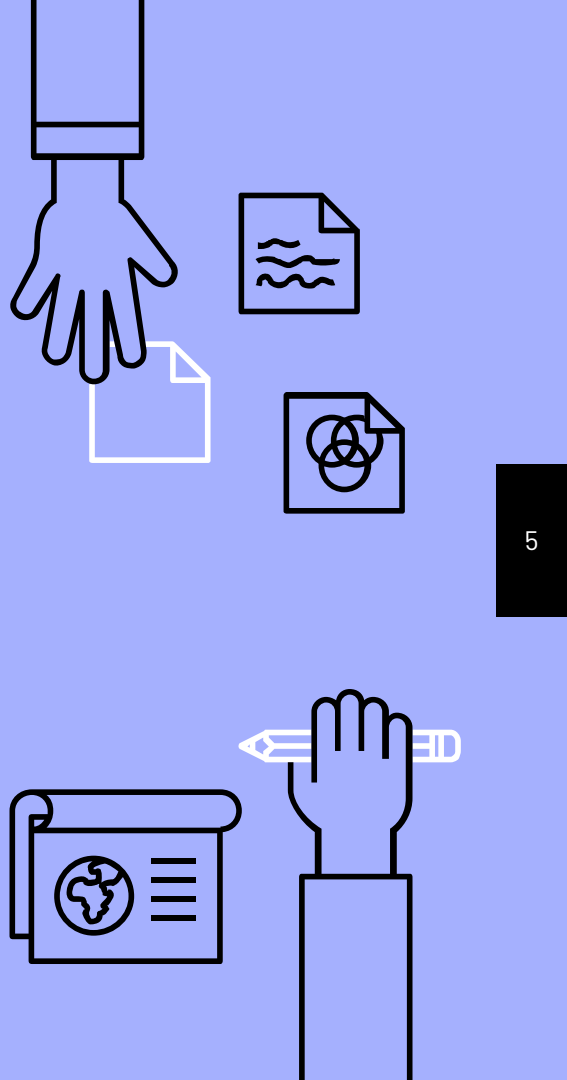
- Suggested we use built-in .NET features, turned out to be a great addition
- Frontend is great
- Styling is coincidentally similar to the guides we will be receiving
- Next iteration needs searching and filtering
- Migrations allow the client to use the frontend even if it's hosted locally
- We need to improve tests



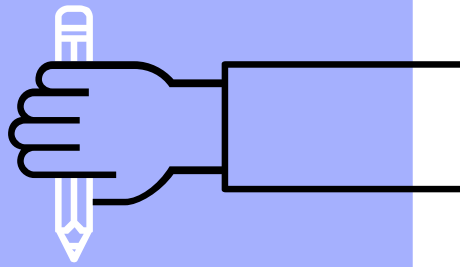


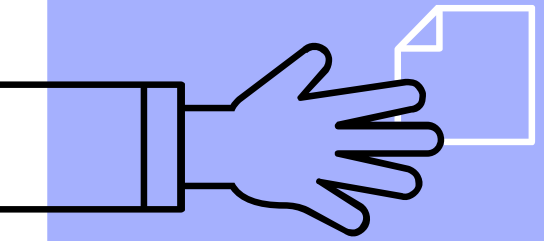
Client Feedback

- Said it is one of the best first iterations they have seen
  - They said they trust us enough to have bi-weekly meetings instead of multiple times in one week
- Everything looks good, styling to fit the marketing department will come later
  - Although they did point out some bugs with the styling that we fixed during the meeting
- Tagging system and calculator frontend should be done next
- They will communicate with FMGSuite, Broadridge, and Vestorly to add in actual content for the database migrations
- Their developers will use the SDK on different projects
- Want us to get certificates so we can deploy on AWS



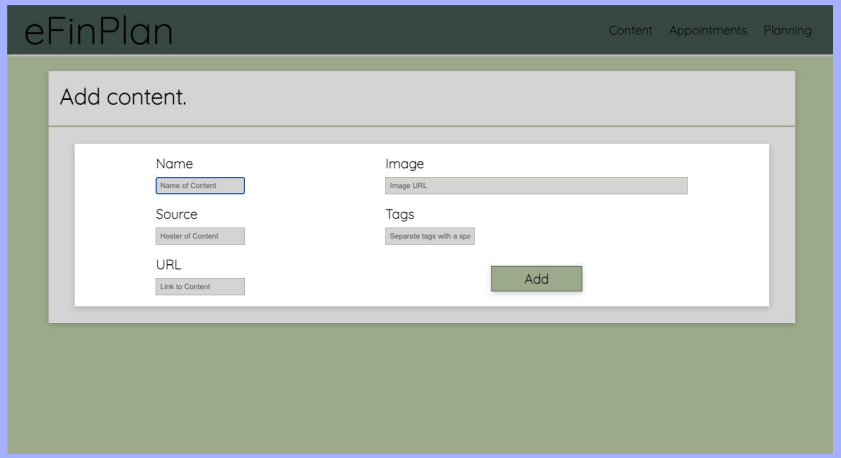
Iteration 1
Features

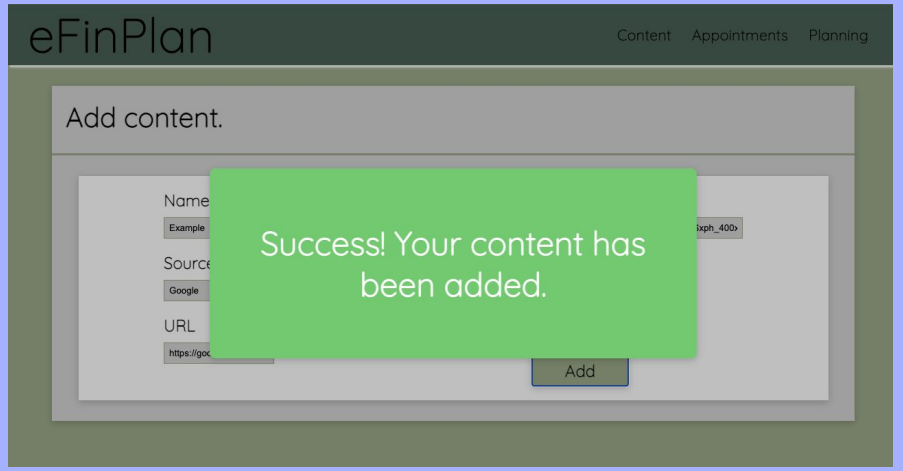




Publishing

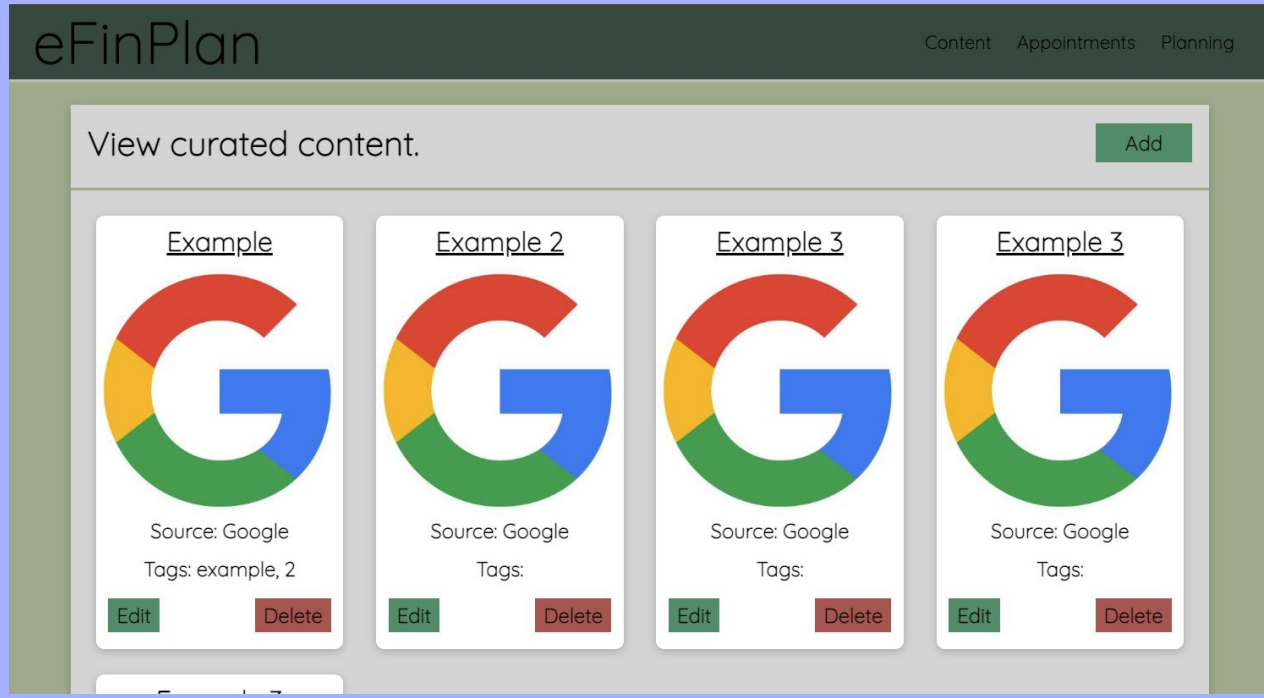
FR1: The website shall allow Advisors to publish content.





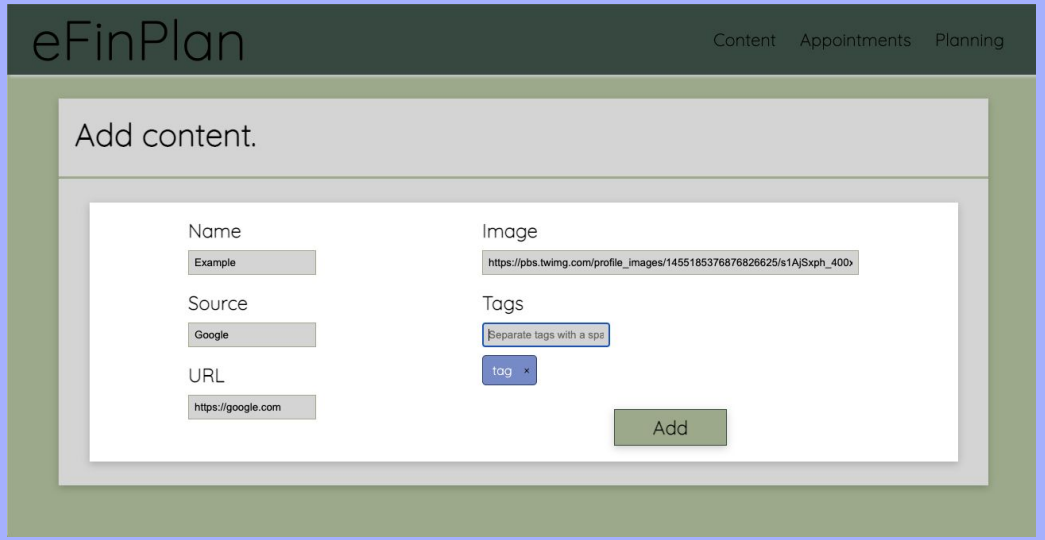
View content

FR5: The website shall allow any user to view all available content in a list.



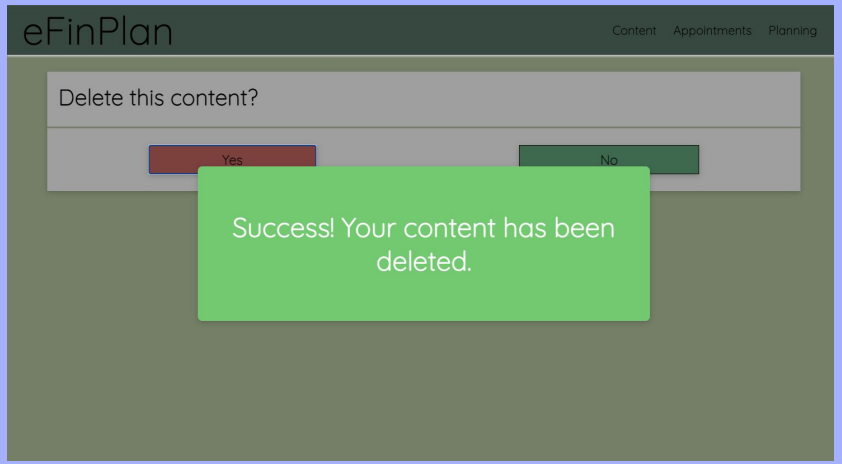
Editing

FR6: The website shall allow Advisors to edit content that they have published.



Deletion

FR10: The website shall allow the Advisor to delete content that they have published.



SDK

Because the SDK is a class library, there isn't much to show visually.

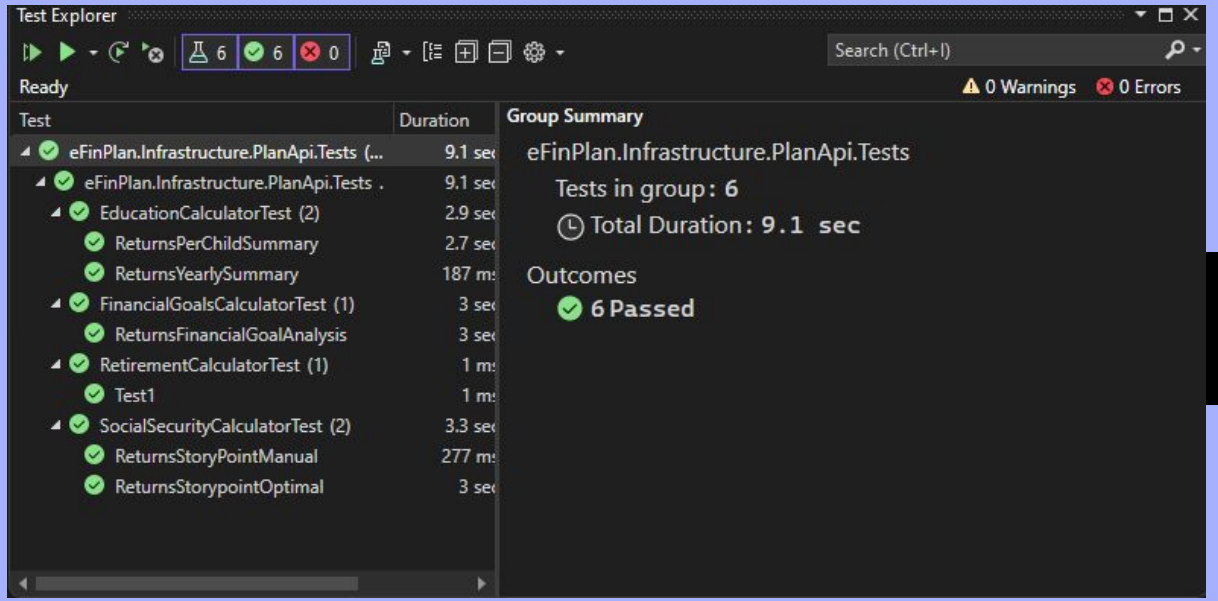
The client intends to use this SDK on various other projects.

FR37: The website shall allow an Investor to use the MoneyTree Plan Education Fund Calculator using the SDK.

FR38: The website shall allow an Investor to use the MoneyTree Plan Financial Goal Calculator using the SDK.

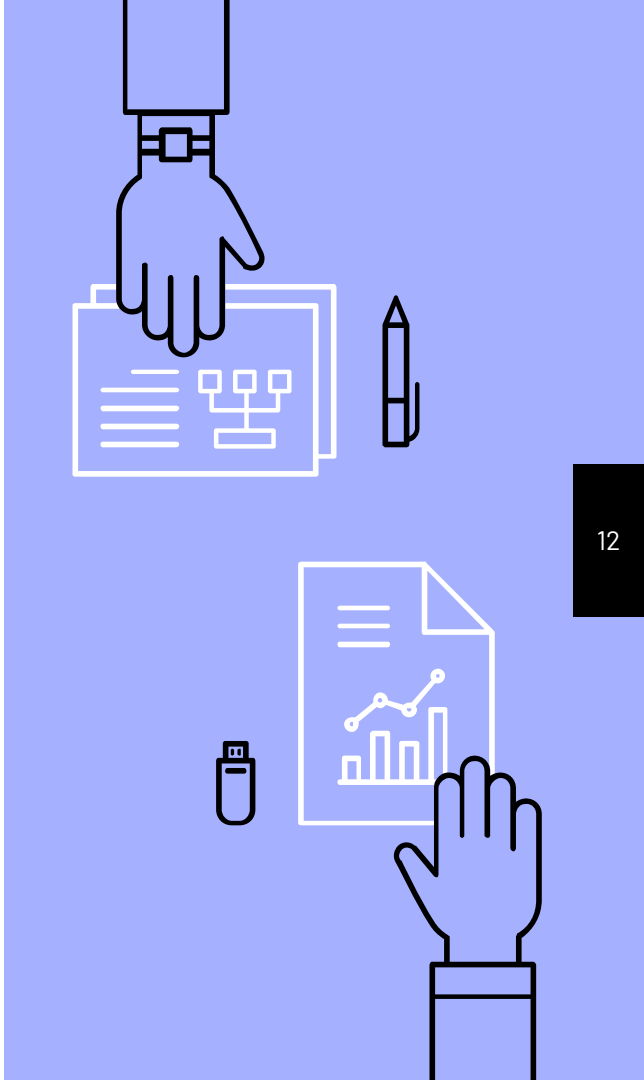
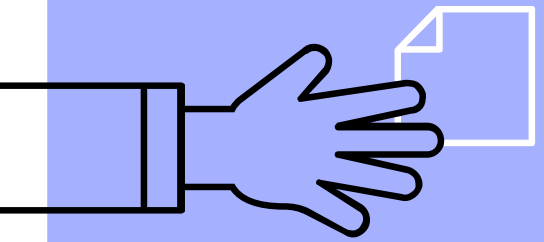
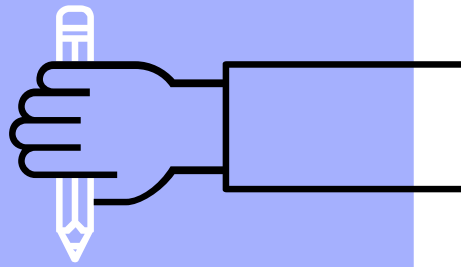
FR39: The website shall allow an Investor to use the MoneyTree Plan Retirement Fund Calculator using the SDK.

FR40: The website shall allow an Investor to use the MoneyTree Plan Social Security Calculator using the SDK.



Plans for iteration 2

- Integrate PlanApi SDK into tools on the financial planning front end. (Finish FR 37-40)
- Extend tagging system to include searching and error handling
  - FR14: If an error occurs once an Advisor tries to add tags, the website shall display an error message for five seconds.
  - FR16: If an error occurs once an Advisor tries to remove tags, the website shall display an error message for five seconds.
  - FR20: The website shall allow any user to search for content by tag using a search bar.
- Add favoriting system
  - FR17: The website shall allow for Investors to favorite content.
  - FR18: The website shall allow for Investors to unfavorite content.



Software demo