

# InvestAway



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## What we promised:

Risk Tolerance Questionnaire

Time Horizon Questionnaire

Investment Period Questionnaire

Investment Strategy Questionnaire

Asset Allocation Questionnaire

Emergency Fund Strategy Questionnaire

Drawdown Questionnaire

Personal Capital Questionnaire

An Account Overview

Output an IPS as a PDF File

Mobile Version

## What we delivered:

Risk Tolerance Questionnaire

Time Horizon Questionnaire

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Personal Capital Questionnaire

An Account Overview

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## **Why was this feature missing?**

Drawdown Questionnaire

Mobile Version

## **Reasoning!**

We were never asked to do this – we included it as a feature initially because it was included in the vocabulary we were given. As the project went on (and our clients further refined what they wanted the project to be) this feature got cut.

This never came to be – our clients made the decision early on to double down on a quality webapp than split our focus with a mobile version.

# **Final Client Meeting**

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- The meeting went well! Accutech plans to use our project in production someday.
- There was not much for us to do as Accutech already owned our source code repository.
- We gave them a .zip file of our GitHub repository so they would have our documentation and such.

**If we restarted this  
project . . .**

### **Successes we'd repeat**

- Meeting in person!
- Using tools to find out when everyone is available.

### **Mistakes we'd avoid**

- Last second changes
- Having a single repo for frontend and backend.

### **Ideas we wish we tried**

- Making better use of branches from the start.
- Alternative methods for creating a PDF.

# **Final Thoughts**



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- How do each of us feel about the final state of our project?
- How do we feel overcoming a two semester long project?
- Any other miscellaneous thoughts?