

Investment Policy Statement Generator

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About Our Team...

- Members:
 - Colin
 - Janardhen
 - Kaleb
 - Spencer

Special Shoutout to our mentor: Evan Knapke

About Our Client...

- Client: AccuTech Systems Corporation
 - Trey Gourley – Lead Software Architect
 - Matt Garrett – Product Manager
 - Scott Meyer – Product Manager



Trey Gourley



Scott Meyer

Student Mentor Feedback

- Evan believed that our project looked good for an iteration one project.
 - There's a lot of improvement and additions that can be done, but many of those are iteration two goals that we didn't have time for.
 - Or they were infeasible due to lack of access to Cheetah's API until a week ago.
- Evan gave us a tip to fix a backend bug where we were struggling to get a file to be recognized by our program. He helped us fix the path issue.

"Things look great to me, and I believe Ergin will be happy with where you are." - Evan

Client Feedback

- Visuals look barren but that is perfectly acceptable.
 - Visuals are a later iteration feature, functionality is primary concern for now and we nailed that.
 - "I am happy that you are not currently satisfied with how it looks because I would expect that." - Scott
- Additionally, Scott liked the options that we have so far for the goal setting section of the questionnaire.
- Matt was pleased that the frontend and backend could communicate with each other at this stage of development.
 - "I am also very happy that you have functionality to connect between the frontend and the backend." - Matt

"You are where I would hope you would be" - Matt

Plans for Iteration Two:

- **FR1:** Introduce integrations with AccuTech's Cheetah™ API.
- **FR2:** Add Time-Horizon to questionnaire.
- **FR3:** Add “Investment Period” section to Goals section of questionnaire.

First
Iteration
Moment

YOU WORK ON FRONT-END AND
I WILL WORK ON BACK-END.



AFTER A MONTH

FRONT-END

BACK-END

