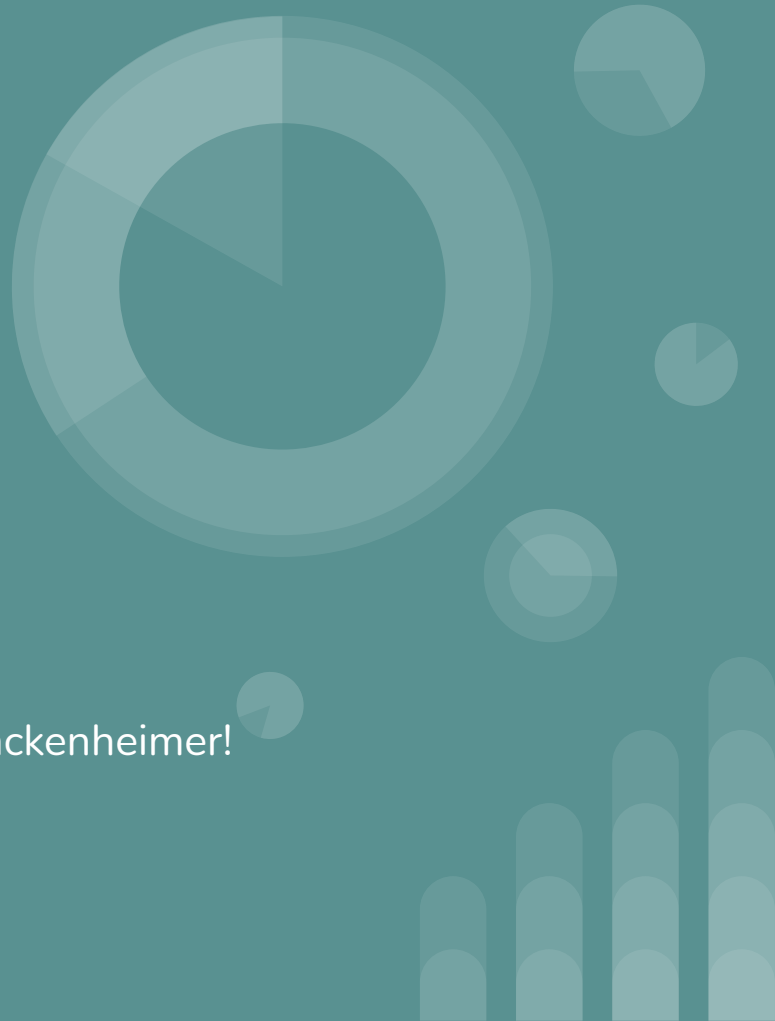


FinWell Apps

Team: Nathan Malitz! Zachary Criswell! Adam Gackenhaimer!
& Alex Thomas!



SOME OF YOU MAY DIE,

**BUT THAT IS A SACRIFICE I AM
WILLING TO MAKE**





Team Members Information - Ran.

Alex Thomas *Neo*. - The resident diplomat, or the social glue that binds us all. Alex is extra friendly, and good at coding and stuff.

Nathan Malitz *Morpheus*. - Is a natural leader and often pushes the team to learn about coding.

Adam Gackenhaimer *Mind Bending-Spoon-Boy* - Looks for opportunities to be productive and stuff. The best coder in the group.

Zachary Criswell *Agent Smith* - Tries to keep the team organized and keeps everyone on track.



Client Information - Nathan

- Moneytree is a firm which specialized in financial planning for its corporate partners.
- They previously only made software to assist financial advisors in providing various services to their clients.
- As part of their transition to larger corporations as opposed to simply wealthy individuals they have commissioned us to create a budgeting app, as well as an accompanying WebAPI, which will be used by employees of these potential financial-corporate-partners.
- This budgeting app/service will be considered a perk gained as a result of using Moneytree's various other services.
- Some aspects this app/project will focus on will be maintaining a custom made budget as well as various savings and/or debt-related goals.

Mentor Feedback - Zachary



- We're off to a good start!
- We have the major components necessary for the foundation of our project.
- Suggested more of an emphasis on user experience, i.e. the frontend, as opposed to the backend as we move forward.
- We were going to make a text interface as part of a proof-of-concept, but he advised against it due to the fact that it would be deleted immediately at the beginning of the next iteration anyway.
- Wu-Tang!



Client Feedback – Alex

- Clients expressed the desire for more of a UI/UX in this iteration and emphasized it as a focal point for the upcoming iterations
- Clients were pleased by the foundation that we had created and acknowledged this as a reasonable first step as opposed to UI
- Assigned us to review competing apps and services to take inspiration from regarding UI/UX



Iteration 2 Features - Zachary

FR8 - Users can create financial saving goals.

FR 33 - Users should see a visualization of the amount that they have saved over different time categories on the home page

FR7 - Show how the money being saved by adhering to a budget can affect the age a user can retire. (Choose when you want to retire)

FR 20 - Users will be able to view the amount of money they have saved since they started using the app.

FR1 - Users can create an account with a unique username, password, name, email, and phone number.

FR2 - Users can add details to their account including age, income level, dependencies, expenses, and goals.

In Summary: We want to focus on two things, user-account creation and a functional UI. Currently, we have the foundations built for our project structure such that it should be easier to contribute to the codebase in subsequent iterations. In addition, we now want to focus on the user experience as the driving force behind further development efforts. We have met the minimum criteria for functionality this past iteration, which, as we add tickets to the “Completed” column, will further allow users to create a simple budget should as well as display to the user the advantages of adhering to it by the end of the iteration.



Software Demonstration

Hold your applause as Adam pulls up the project.