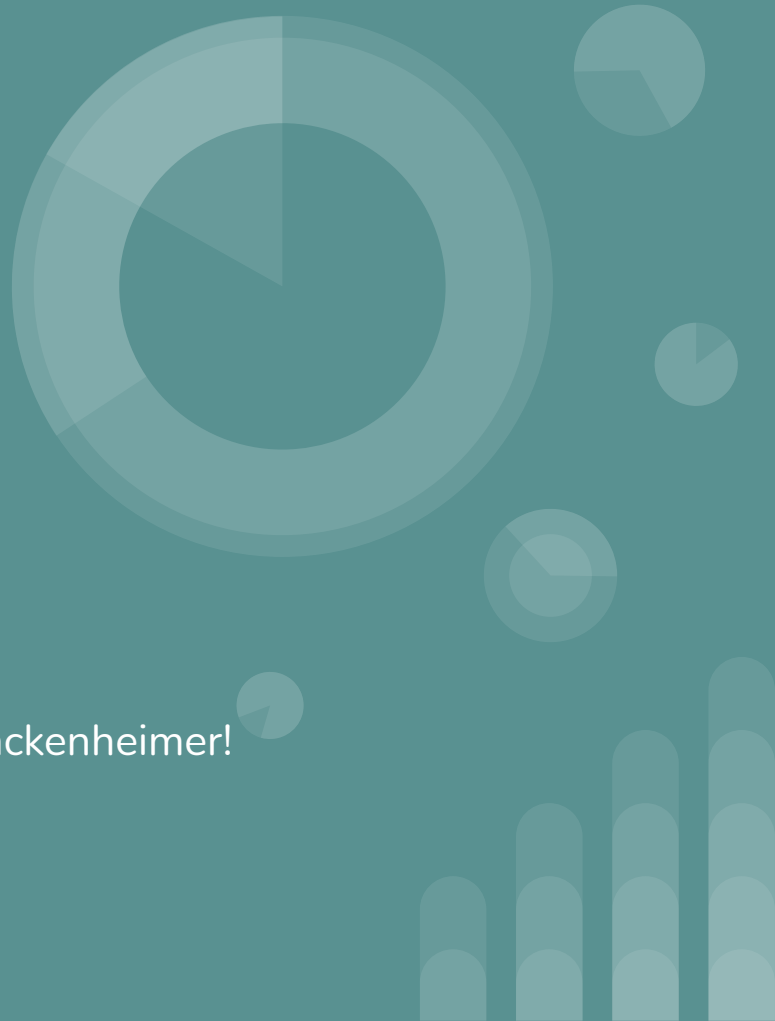


# FinWell Apps

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





*Interesting Slide!*

Otters participate in gang warfare with other otter families.



## 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 more about coding.

**Adam Gackenhimer** *Mind Bending-Spoon-Boy* - Was the one who carried us this iteration.

**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



- Suggested more testing was needed.
- Looking forward to seeing backend and UI integration and account creation.
- Suggested needing more functionality on the frontend
- Suggested a few areas where we could clean up code.
- Wu-Tang is for the children! Diversify yo' bonds!



## **Client Feedback** - Alex

- Meeting with clients Wednesday and will update accordingly for presentation



# Iteration 4 Features - Zachary

**FR8 - MED - BR1, BR3** - Users can create financial **saving** goals.

**FR 33 - HIGH - BR 1, 3** - Users should see a visualization of the amount that they have saved through different time categories on the home page.

(This includes sub features such as adding a calendar)

**FR7 - MED - br1, br2, br3** - 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)

**FR2 - HIGH - BR2** - Users can add details to their account including age, income level, dependencies, expenses, and goals.

**FR36 - HIGH - BR1, BR2** - Host the API on a server to be utilized by the application

***In Summary:*** Our primary focus in this upcoming iteration is two things:

- Finishing the integration of our application with Identity Server 4, allowing user account creation
- Hosting the API on a server and setting up the frontend to call the different endpoints



# Software Demonstration

Hold your applause as Adam pulls up the project.