Estate Vault

Iteration 5

Meet The Team

FROM THE TEAM

ESTATEVAULT

"This iteration has been imperative in defining who we are separately, but also how each of our skillsets have been essential in making our team work. I am grateful for the knowledge gained during this past month, and I am excited for what's to come."

Cameron Allan
Frontend

"Iteration 2 was like iteration 1 but with ground to stand on. With a foundation, it felt much more natural to set goals and build smarter systems faster. I have no doubt the Estate Vault team will keep delivering into the next iterations."

Landon Hammond
Backend and RDS

"I am super proud of the way the team came together for this iteration. All the late nights really paid off. Our workflow was far improved and everyone brought their a-game!"

Peyton Schaefer
Frontend

"I could not have asked for a better team. Everyone has been an indispensable member of this capstone experience, and I'm so excited to see where we go next."

Nate Slagter
Backend

Client Information

- Accutech fulfills its purpose to make great things happen for other people by delivering innovative trust and wealth management technology solutions and exceptional, personalized service to over 200 banks and wealth management companies nationwide.
- Located in downtown Muncie.

Features Completed

Checklist

- Users are now able to see a checklist with specific documents in it.
- Website guides new users to this checklist to ensure that they have their estate in order.
- Checklist is visible on the dashboard.
- Flexible code in the backend to allow for more documents.

Mobile Styling

- Site is now able to be viewed on mobile devices.
- Functionality is exactly the same as on desktop.
- Pages readapted for ease of use on mobile devices.

EstateVault

Recent Files

last-will-and-testament.pdf

Checklist

- ~~Upload a Last Will and Testament~~
- Upload a Letter of Instruction
- Upload a Financial Power of Attorney
- Upload a Medical Power of Attorney

Dashboard Documents Connections Contacts

EstateVault

Invites

Send Invite

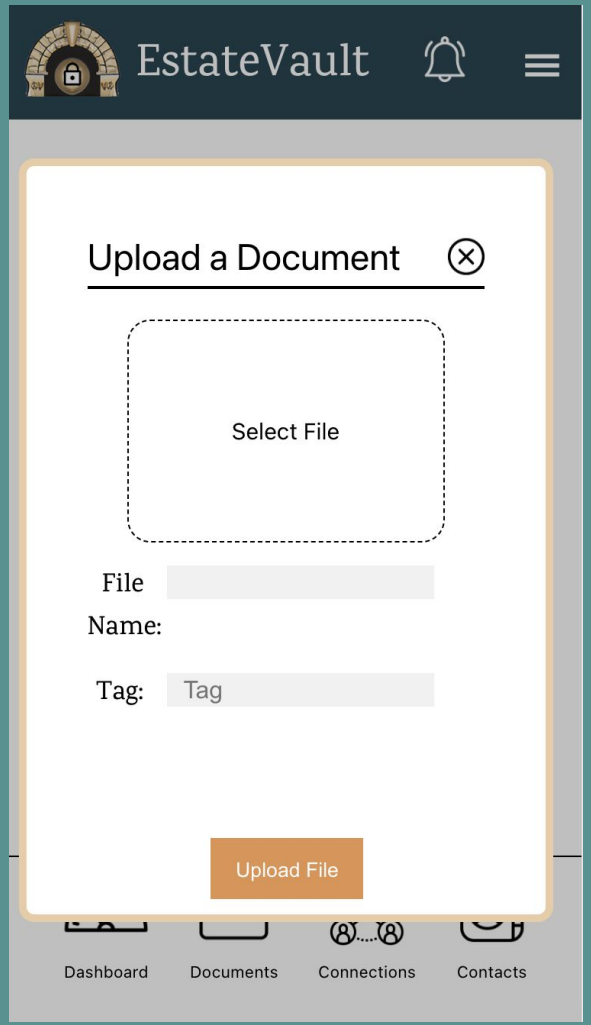
You have no invites.
Input the professional's email above to send one!

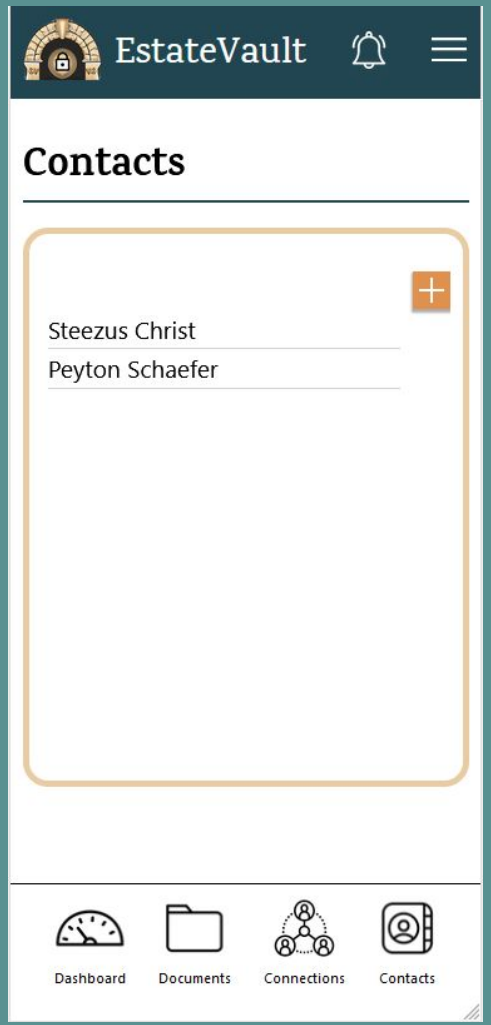
Current Connections

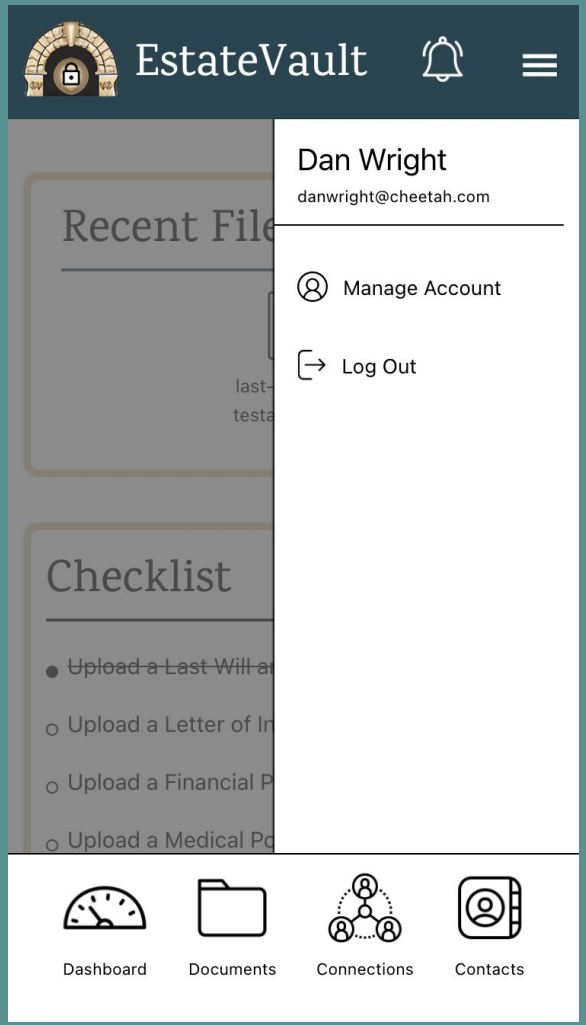
Invite a professional to your network by inviting them using their email in the invites box, or accept an incoming invite to see them here!

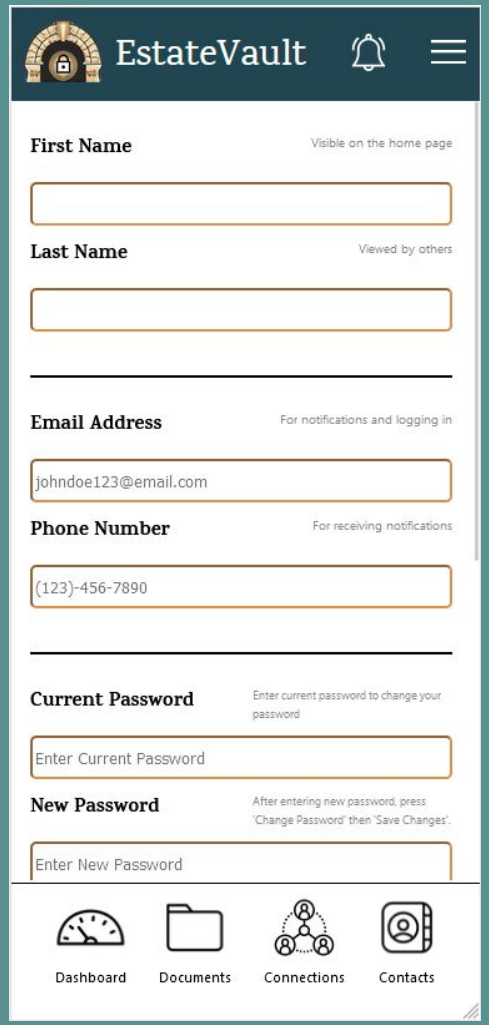
From there, you can manage individual access to documents and remove connections.

Dashboard Documents Connections Contacts


EstateVault
Upload a Document
Select File
File Name:
Tag:
Tag
Upload File
Dashboard
Documents
Connections
Contacts


EstateVault
Contacts
Steezus Christ
Peyton Schaefer
Dashboard
Documents
Connections
Contacts


EstateVault
Dan Wright
danwright@cheetah.com
Manage Account
Log Out
Recent File
Checklist
Upload a Letter of In
Upload a Financial P
Upload a Medical Pc
Dashboard
Documents
Connections
Contacts


EstateVault
First Name
Visible on the home page
Last Name
Viewed by others
Email Address
For notifications and logging in
johndoe123@email.com
Phone Number
For receiving notifications
(123)-456-7890
Current Password
Enter current password to change your password
Enter Current Password
New Password
After entering new password, press 'Change Password' then 'Save Changes'.
Enter New Password
Dashboard
Documents
Connections
Contacts

Mentor Feedback

- We showcased to Michael the backend implementation of the checklist.
- Showed progress made towards full mobile integration of the UI.
- Discussed how we wanted to go about implementing the checklist into the frontend.
- Offered little feedback for us, overall thought that our plans for the overall implementation of the checklist was good.

Client Feedback

- Dan mentioned the possibility of having multiple checklists per user in the future, that can be created by either a professional, or the dev team.
- He appreciated how simple it was and how easy it all was to follow.
- He appreciated the prompts on the pages and thought it was a nice way to introduce the user to the system.

Project's Benefit

- Allows for a more straightforward onboarding process for new users.
- Allows for possible future implementation of custom checklists for different guided content.

Interesting Slide

“Tyler Newlin explains EstateVault to Landon Hammond” 2023, digital, Author; Cameron Allan

Retrospective