

ESTATE PLANNING SAAS PLATFORM

INHERITUS.

Building an estate planning
platform from zero —
B2C, B2B, and everything in between.

ROLE

Sole UI/UX Designer
& Frontend Developer

TIMELINE

2024 — 2026

SCOPE

6 Surfaces · 0 → 1
B2C + B2B SaaS

URL

inheritus.com

The Brief

Estate planning is a legally complex, emotionally sensitive process. Most families avoid it entirely — not from carelessness, but because the tools have never been accessible. Inheritus needed a platform capable of holding legal workflows, sensitive documents, and family relationships without feeling clinical, intimidating, or cold.

The ask was total: design the entire product experience, brand, and marketing presence from zero. Two SaaS products — Legacy360™ for planning ahead and Estate360™ for settling an estate — a marketing website, a B2B partner portal for enterprise clients, a unified design system, and the brand identity itself. One designer. One developer. The same person.

6

Design surfaces
built from scratch

2

Core SaaS
products launched

2

User types served
B2C + B2B

1

Designer & developer
sole ownership

Legacy360™

Pre-death planning. Collaborative wills, healthcare directives, digital asset management, and secure document storage with family sharing.

Estate360™

Post-death settlement. Guided executor workflows, asset inventory, debt management, and distribution planning step by step.

What I Built

Every surface of the product — from brand identity to enterprise portal — designed and developed as sole owner, from blank slate to live product.

01 · MARKETING

Marketing Website

inheritus.com — dual-path architecture serving B2C planners/executors and B2B enterprise partners. Conversion-optimized with subscription flows and product education.

02 · B2C SAAS

Legacy360™ App

Pre-death planning app. Guided workflows for wills, healthcare directives, power of attorney, digital assets, and family collaboration tools.

03 · B2C SAAS

Estate360™ App

Post-death settlement tool. Step-by-step executor guidance, asset inventory, debt management, distribution planning, and legal documentation.

04 · B2B

Partner Portal

Enterprise interface for advisory firms and financial institutions. White-label management, API integration oversight, and client portfolio administration.

05 · SYSTEM

Design System

Component library spanning all 6 surfaces. Token-based color, typography, and spacing systems with documented interaction states.

06 · BRAND

Brand Identity

Complete identity built from zero: logo, color system, typeface pairing, iconography, and communication tone for a sensitive, high-stakes domain.

The Core Challenge

Designing multi-step workflows complex enough to guide someone through the legal landscape of death and inheritance — while feeling as simple as signing up for any other SaaS product.

Estate planning involves dozens of legally-critical, emotionally weighted steps. Every workflow decision carries real-world consequences: missed deadlines, overlooked assets, unclear directives. The UX had to be both comprehensive and calm — guiding without overwhelming, detailed without being bureaucratic.

01 **Progressive Disclosure**

Surface legal complexity only when contextually relevant. Default views show task status and next actions — not the full weight of what needs to be done. Complexity is earned through interaction, not front-loaded onto every screen.

02 **Guided Step Architecture**

Task-oriented flows with persistent progress context. Users always know where they are, what is complete, and what remains — maintaining orientation through complex multi-stage processes without cognitive overload.

03 **Dual Information Density**

Legacy360™ (low urgency, future planning) and Estate360™ (active administration, time-critical) required distinct information hierarchies and visual registers — same system, two purposefully different densities.

System Before Product

Building the design system before the first product screen was the decision that made solo ownership of six surfaces viable. With no team to enforce consistency, the system was the team — a shared set of constraints that kept every surface coherent from day one.

WHAT WAS BUILT

- Semantic color tokens — background, surface, border, text, action, and status layers
- 7-level typography scale across 2 typefaces with defined weight usage
- 40+ reusable UI components with complete interaction state definitions
- Responsive 12-column grid system for web and app surfaces
- Estate domain-specific icon system
- Form, input, and validation pattern library

WHY IT MATTERED

- Each component built once, deployed across all six surfaces with zero redundancy
- Frontend velocity compounded — later surfaces were faster than earlier ones
- B2C and B2B surfaces remained visually consistent without extra design effort
- Fewer QA cycles — patterns tested once, not repeatedly per surface
- Enabled the 0 → 1 launch on a tight timeline despite solo scope

DESIGN PRINCIPLE

“Build the language before the words. A system designed before the product means every decision compounds rather than competes.”

Outcomes

From blank slate to live product: two SaaS apps, a marketing site, a B2B portal, a design system, and a brand — with measurable results at every layer.

LAUNCH

0 → 1 Product Launch

Complete product ecosystem launched from zero: inheritus.com marketing website, Legacy360™ and Estate360™ SaaS applications, and B2B partner portal — all live and in market. No templates. No prior codebase. Built from the ground up, solo.

SYSTEM

Design System Reduced Development Time

Building the component library first eliminated redundant development work across all six surfaces. Frontend velocity increased with each new surface — a compounding return on the initial system investment that made the timeline possible.

USERS

Validated by Real Users

“Legacy360 made it simple to organize everything in one place. My family knows exactly what to do, and I feel a real sense of relief.” — Jordan M., Legacy360™ Client. The core design goal — making a sensitive, complex topic approachable — surfaced directly in user language.

What This Taught

“The design challenge wasn’t just aesthetic. It was philosophical: how do you make death approachable?”

Taking a product from zero across six surfaces — B2C and B2B, emotional and enterprise — required designing at two registers simultaneously. The consumer product needed warmth and clarity; the enterprise portal needed structure and confidence. Both had to feel like the same brand without feeling the same.

The answer was in the system: clear patterns that established trust, space that respected the weight of the content, and a visual tone that never slipped into clinical coldness or forced optimism. Designing solo across the full surface was the hardest and most clarifying constraint — every decision had to be principled, because there was no one else to catch inconsistency.

ROLE

Sole UI/UX Designer & Frontend Developer

COMPANY

Inheritus Inc. — inheritus.com

DESIGNER

Vishesh Makwana

UI/UX Design + Frontend Development
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