SpendWell

YOUR PERSONAL FINANCE ASSISTANT

By: Anubhav Chaudhary
Aryan Shukla
Ankit Singh

Key challanges in Personal Finance

- Overspending and lack of awareness of spending habits.
- Difficulty in setting and maintaining savings goals.
- Inadequate investment strategies and financial risk management.
- Lack of personalized financial guidance.

What is Spendwell???

- SpendWell is an AI-powered finance Coach and a expense tracker designed to help individuals make better financial decisions.
- By analyzing users' spending patterns and financial goals, SpendWell offers personalized financial advice and proactive recommendations.
- The platform aims to simplify budgeting, savings, and investment management with cutting-edge technology.

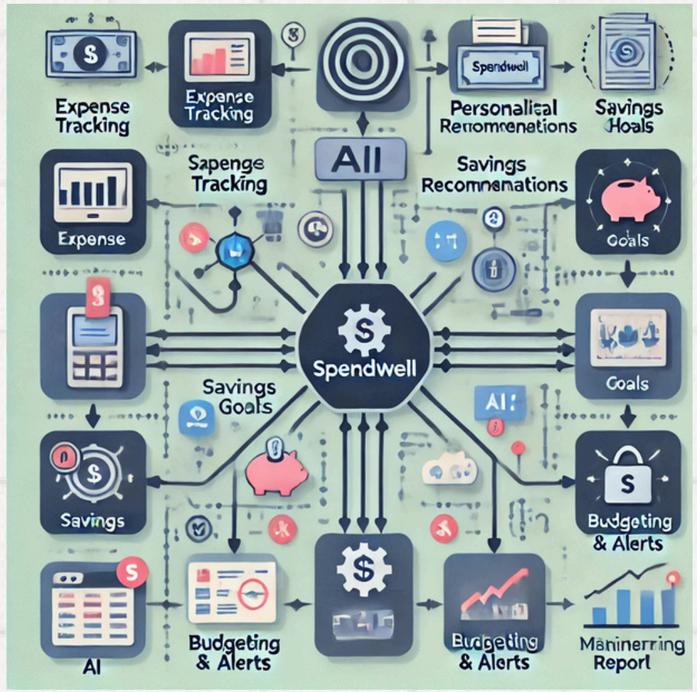
How Spendwell solves these problems

Expense Tacking

Automatically categorizes expenses and identifies areas of overspending.

AI-Powered Advice

Provides personalized budgeting tips, savings strategies, and investment recommendations.



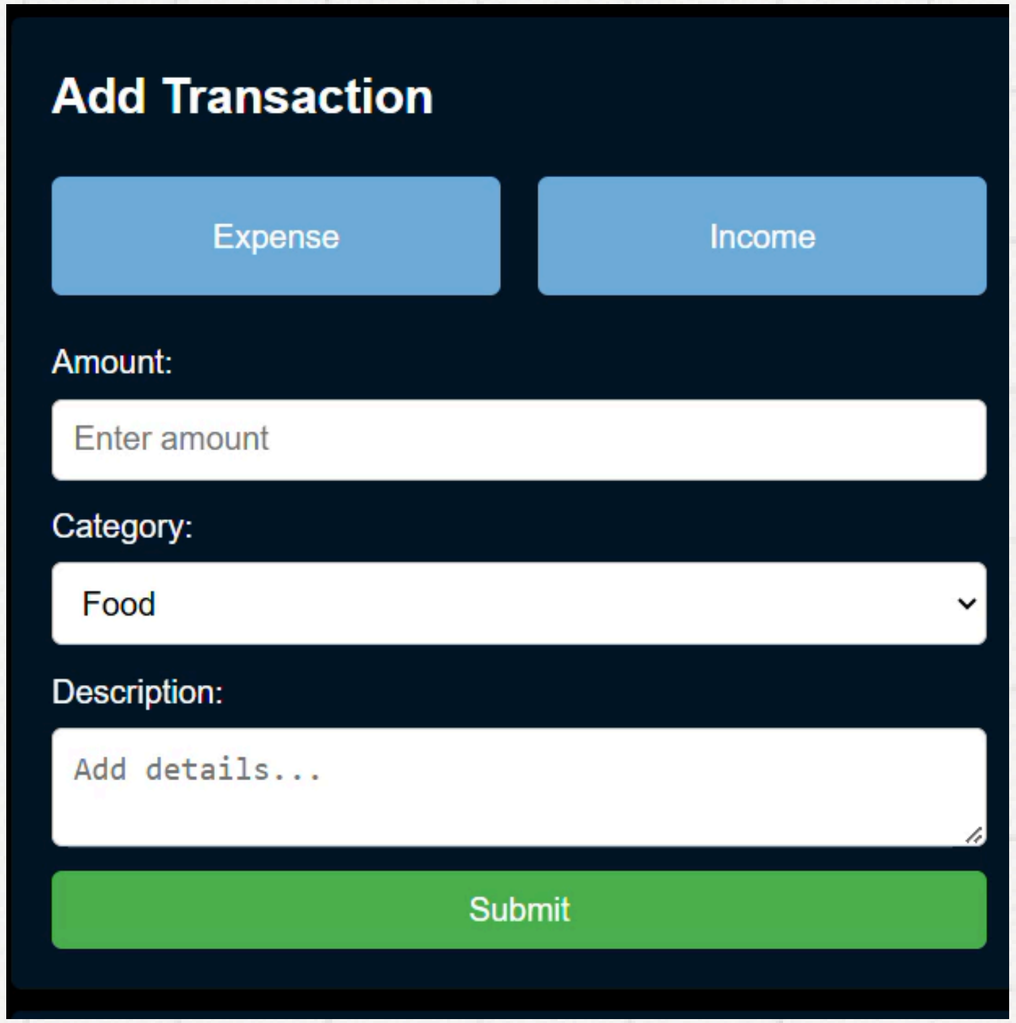
Proactive Alerts

Sends notifications about financial risks, such as overspending and insufficient savings.

Smart Financial Decisions

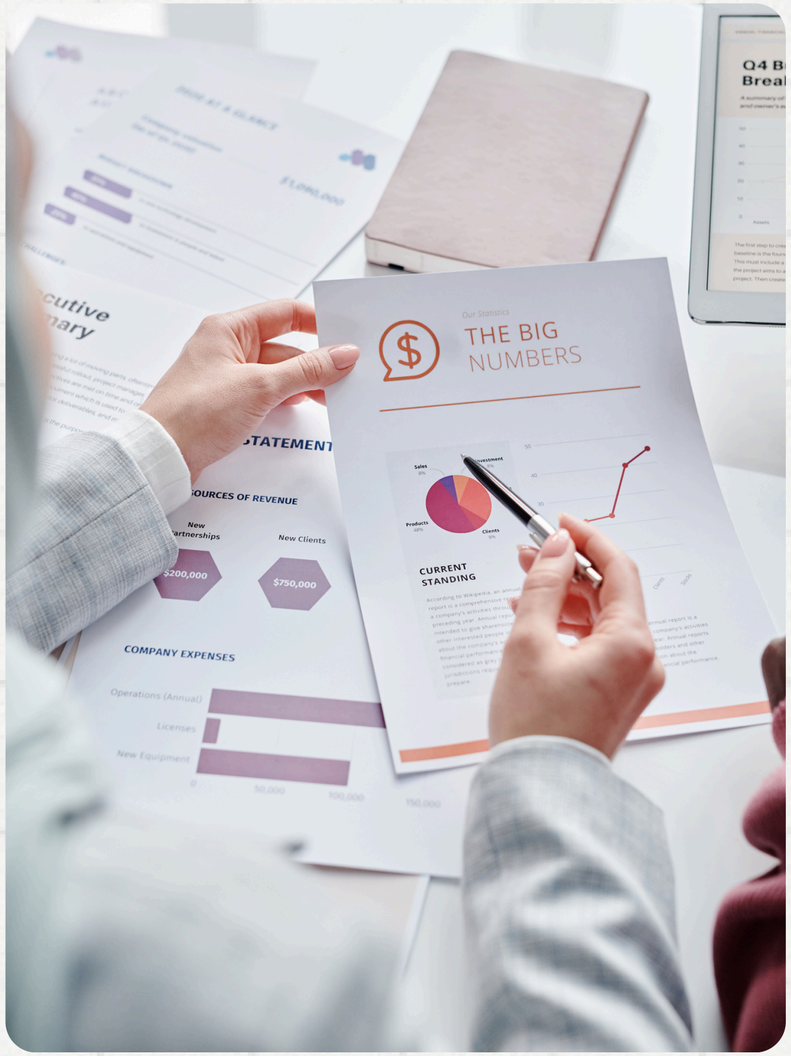
Guides users toward better spending, saving, and investing choices.

Core Features of Spendwell



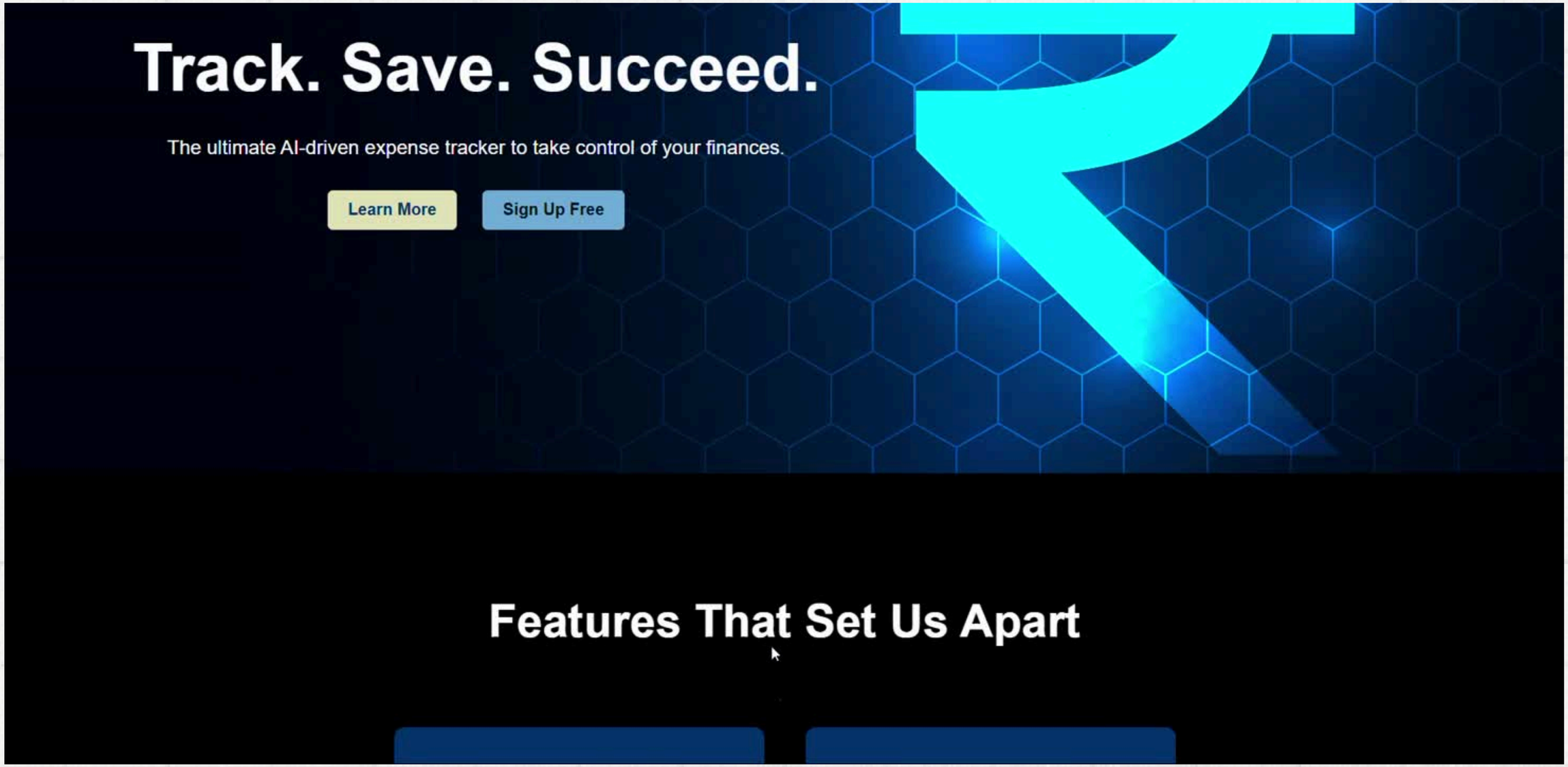
- **Personalized Financial Dashboard:** Overview of income, expenses, savings, and financial goals.
- **AI-Powered Chatbot:** Answers financial questions and provides advice based on user data.
- **Expense Categorization:** Automatically classifies expenditures for better tracking.
- **Budgeting & Alerts:** Users set budgets and receive alerts for potential overspending.
- **Savings Goals:** Set and track progress toward savings and investment goals.
- **Financial Reports:** Visual reports showing spending patterns, savings progress, and more.

How the AI Chatbot works



- **Real-Time Query Handling:** Leverages Gemini API for efficient and responsive interactions with users.
- **Customizable User Experience:** Utilizes Flask for seamless deployment, enabling adaptive and personalized responses.
- **Financial Alerts and Insights:** Proactively notifies users about spending patterns, savings gaps, and actionable advice.
- **Finance Coaching and Guidance:** Acts as a virtual finance coach, providing clarity on financial terms and personalized guidance to help users make informed financial decisions.

Here’s a demo….


Track. Save. Succeed.
The ultimate AI-driven expense tracker to take control of your finances.
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Features That Set Us Apart

SpendWell

Features How It Works Contact

Landing page

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Reports Ask Your Queries !!

User Interface

Add Transaction

Expense Income

Amount:

Enter amount

Category:

Salary

Description:

Add details...

Submit

Transaction Report

1/9/2025 - salary: ₹10000 Delete

Login Page

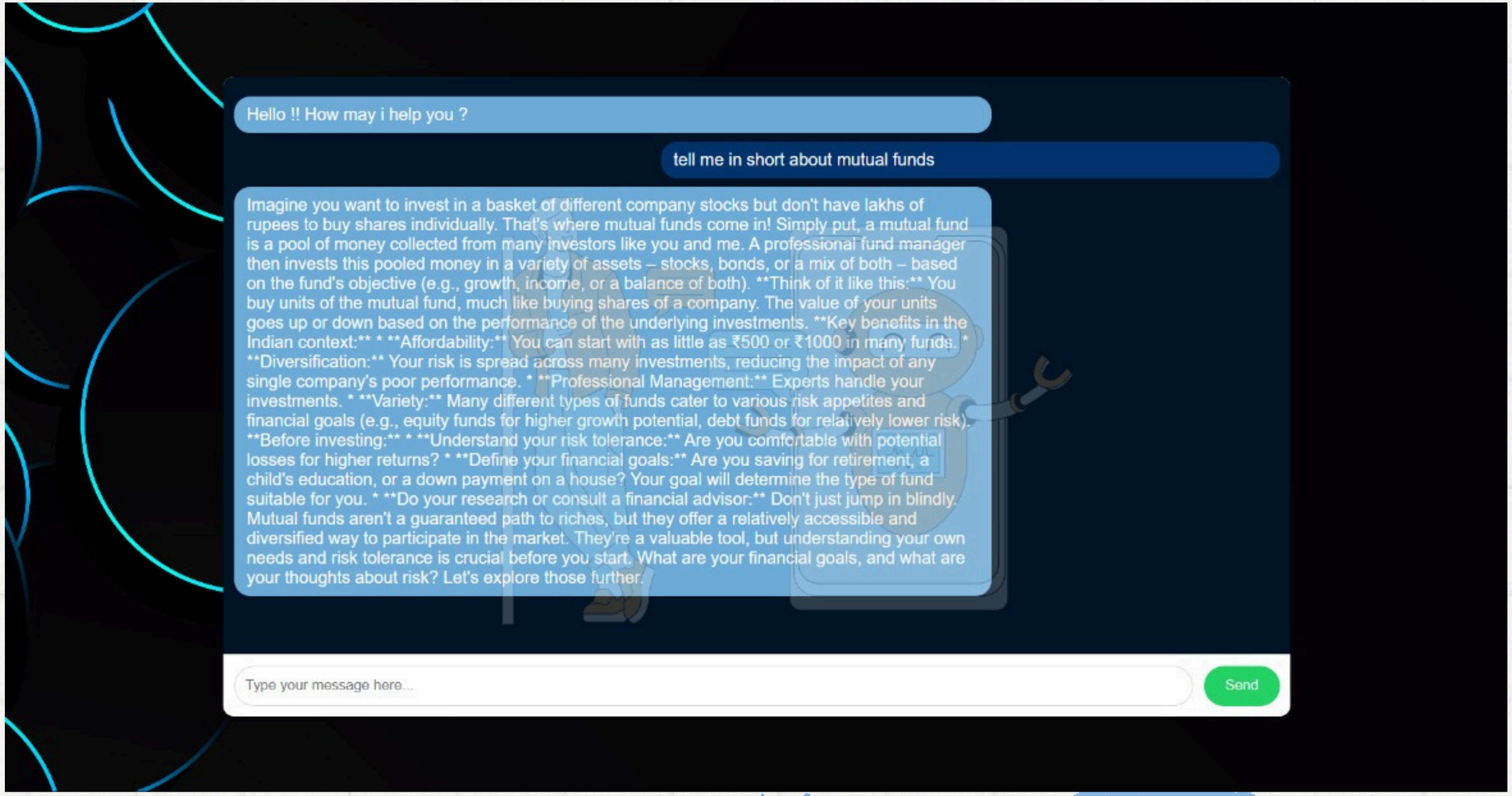
Welcome to SpendWell

Username:

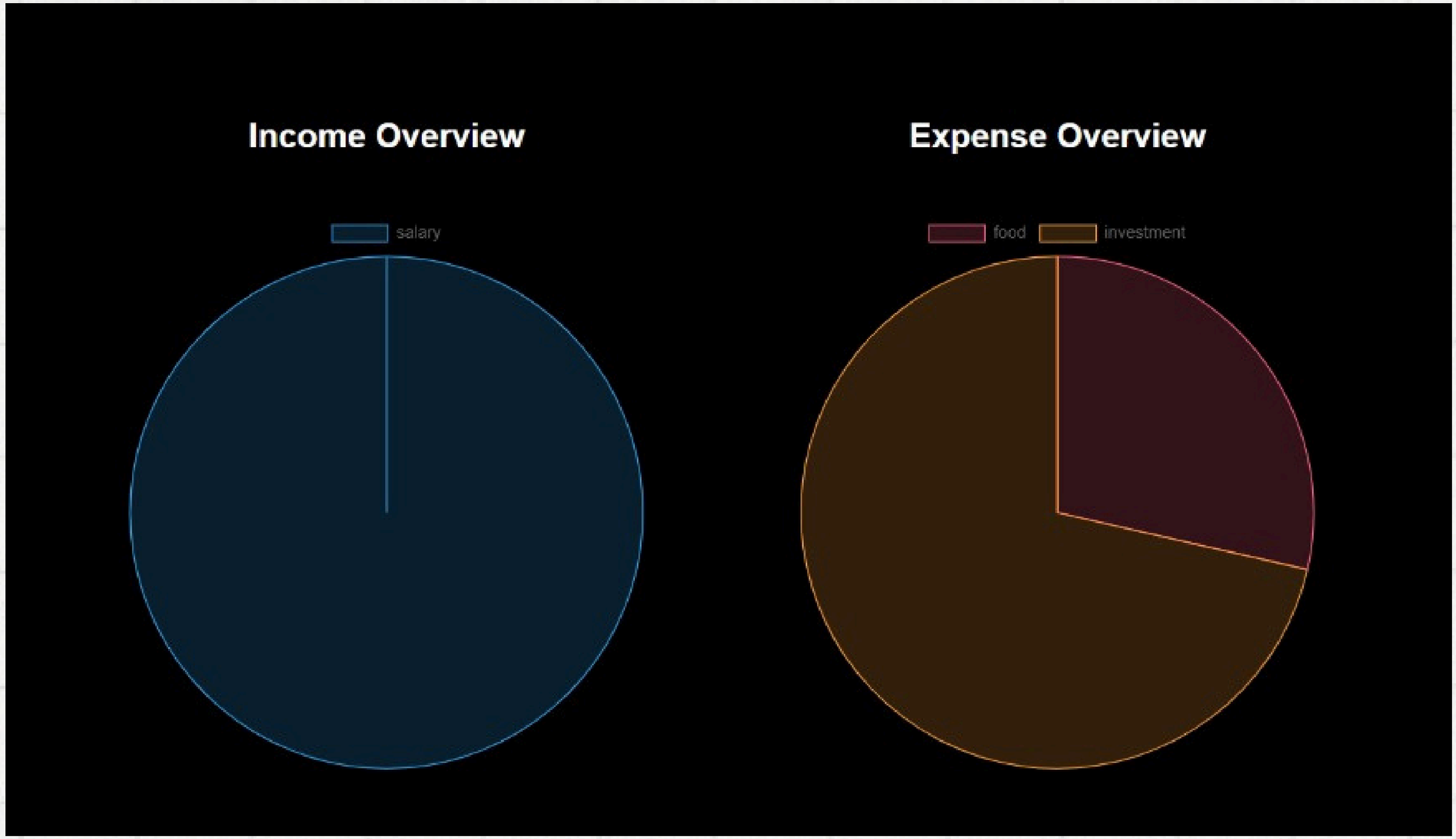
Password:

Login

Finance AI Bot



Transaction Overview
Transaction Amounts
6,000
5,000
4,000
3,000
2,000
1,000
0
salary
food
investment


Income Overview
salary
Expense Overview
food
investment

Benefits for Users

Personalized Advice: Tailored financial recommendations based on individual spending patterns.
Easy Financial Management: Track all your finances in one place with minimal effort.
Proactive Alerts: Stay informed with timely warnings about financial risks.
Goal-Oriented: Helps users stay focused on achieving financial goals like saving for a house, retirement, or a vacation.
Simplicity & Convenience: An intuitive interface that anyone can use.

Thank you very much!

From Team SpendWell