

Team 8 Project Charter

FINEX

Team Members:

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Problem Statement:

Personal finance tools are very segmented and can be difficult to navigate. We want to create an easy-to-use tool which allows for tracking of various aspects of personal finance. This will be different from existing or similar services due to its ease of use as well as its combination of existing services into one application. It will also attempt to further the public's financial literacy through the use of pictorial representations and other devices to help those who may not understand technical terms used in other, similar products.

Project Objectives:

- Build a website which will be able to provide a dashboard to manage personal finances and view stock portfolio
- Create user profiles for storing personal information and data on personal finances
- Maintain a backend service to facilitate communication from the application and database
- Develop a system to manage finances such as budgeting and expense report
- Develop a system to view stock information and alert users of changes

Stakeholders:

Users: Typical users include people interested in making informed financial decisions and investments.

Developers: Daniel Joseph, Aditya Naik, Hugh Bromund, Niyati Sriram, Peyton Williams, Nathan Ashta

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Project Owners: Daniel Joseph, Aditya Naik, Hugh Bromund, Niyati Sriram, Peyton Williams, Nathan Ashta

Project Deliverable

- Front end React web application that provides access to user investment budgeting and tracked stock information
- Back end service written in xpress that regularly updates equity and related financial information to be relayed to our front end
- Secure database in MongoDB that stores users accounts info and related financial data
- A service which sends emails to alert users to any important changes

Optional Ideas

- Trend-monitor for individuals stocks that uses day-trader techniques to explain and visualize important trends in stocks
- Crypto currency tracker using existing API's and a similar system with the aforementioned technologies
- Machine learning algorithm using python libraries like Pytorch to predict stock trends and provide recommendations