

# PRELIMINARY INVESTIGATION REPORT

Subject: Personal Finance Manager

Date: 2-23-2021

## INTRODUCTION

The system is a personal finance manager application that allows users to track, manage, and plan for short and long-term recurring expenses. This investigation was initiated and conducted by Brenden Campbell, Jared Crew, James Saiban, and Kayla VanDusen.

## SYSTEMS REQUEST SUMMARY

Pay schedules vary widely between different occupations and workplaces. Managing various recurring expenses with differing renewal periods can become quite challenging and potentially lead to overdrafts or insufficient funds. This system would address these issues by providing an intuitive scheduling platform for managing both accounts receivable and accounts payable over varying terms from one, unified location.

## PRELIMINARY INVESTIGATION FINDINGS

[Results of interviews and research of other existing, similar systems]

## RECOMMENDATIONS

[Recommendations based on open-ended interview responses]

## TIME AND COST ESTIMATES

The project will be completed by 1 May 2021 and is expected to cost an estimated \$0.00.

## EXPECTED BENEFITS

There would be no direct tangible benefits to the system, however, it has a strong potential to provide a benefit to users in terms of ease of personal accounting and finances.