# Capstone Project: Album Financiero – Executive Summary

# Overview

The Album Financiero is a Power BI-based interactive solution designed to track, analyze, and optimize personal financial activity across a 10-year period. The project transforms a raw Excel file into a scalable and insightful dataset.

# Objective

To build a data-driven tool that:

* Answers five key financial questions around budgeting, spending, credit card payments, savings, investments and financial sustainability.
* Centralizes all financial history into a clean, normalized format.
* Enables monthly and yearly tracking through a dynamic report.

# Main Components

* Data Cleaning & Transformation: Consolidated and standardized 10+ years of personal financial data from multiple Excel tabs.
* Power BI Visuals: Custom visualizations for budgets, spending trends, credit payments, investment tracking, and travel costs.
* Normalized Tables: Redesigned the data model with clean dimension tables
* Dynamic Filtering: Users can explore data by month, location, category, or financial goal.

# Key Financial Questions Answered:

* How much money do I have in my payment methods and in my credits?
* How much do I have budgeted in the month? How much remains to be spent?
* What day is my final credit card payment due and how much should I pay? Have I arranged the money to pay the debt on time?
* Where and during which trip did I spent the money? How much did I spent per clave?
* How much money do I currently have in my savings accounts? How have my investments changed over time? How many months can I sustain my current lifestyle based on my average monthly budget and my available savings?

# Public Files

* Excel File: album\_financiero\_publico.xlsx (anonymized and scaled data)
* Power BI File: album\_financiero\_publico.pbix (final report based in the Excel file.)
* Documentation: Full report and summary in English and Spanish.

# Tools Used

* Microsoft Excel (ETL base)
* Power BI (data modeling + visualization)
* DAX Measures
* Power Query