**Capstone Project Meeting Notes** **Project Title:** Smart Financial Planning Website (FinTech)  
 **Client:** Ravinder (Employer/Supervisor)  
 **Prepared By:** [Your Name]  
 **Date:** May 15, 2025

**Meeting Summary**

**1. First Meeting – May 6, 2025 (Tuesday at 9:00 AM)**

**Attendees:**

* Ravinder (Employer)
* Project Team Members

**Discussion Points:**

* Ravinder introduced the domain of the project: **FinTech**.
* He provided an **overview** of the expected project goals and key terms:
  + Topics discussed: **Insurance**, **Bond Rates Comparison**, **Types of Investments in Canada**.
  + The project aims to develop a **smart financial planning website** that:
    - Asks the user a series of questions.
    - Creates a customized **financial plan** based on their **dream goals** (e.g., buying a house in Canada).
* Deliverables assigned for the upcoming week:
  + Prepare the following artifacts based on selected features:
    - **Use Case Diagram**
    - **Logical Diagram**
    - **Technical Architecture Diagram**
    - **Graphical User Interface (GUI) Design**

**2. Second Meeting – May 13, 2025**

**Discussion Points:**

* Team shared preliminary **feature ideas** including:
  + **Investment Options**: Insurance, Stocks, Mutual Funds, GICs, Cryptocurrencies.
  + **Account Types**: TFSA, RRSP, RESP, FHSA.
* Ravinder observed that the project scope was still not clearly defined and guided the team to:
  + Use the following website as a **reference model** for feature design and layout:
    - [Aditya Birla Capital Wealth Site](https://wealth.adityabirlacapital.com/)
  + Extract **feature ideas** from the reference and organize a proper feature list.
  + Focus on user-centric functionality that helps calculate **Return on Investment (ROI)** and build **personalized financial plans**.

**Develop the following project documents** based on finalized features:

* Use Case Diagram
* Logical Diagram
* Technical Architecture
* GUI Mockups