

Half-page Proposal for FinGenie

Challenge Question:

Empowering users with personalized financial guidance by leveraging AI to analyze spending habits and provide smart recommendations for budgeting, saving, and investing.

High-Level Approach:

FinGenie will integrate with user financial data securely and use Claude API to analyze transaction patterns, categorize expenses, and generate actionable insights. The solution will deliver personalized tips through a chatbot interface, making financial literacy accessible and easy to understand. Key components include data ingestion, AI-driven analysis, and an intuitive user interface for real-time interaction.

Sample Reference Architecture:

- Data Source: User financial transactions (bank APIs or manual input)
- AI Processing: Claude API for NLP and recommendations
- Frontend: Chatbot app (web or mobile)
- Backend: Server handling data aggregation, API calls, and user management