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For this assignment, I decided to make a financial advisor expert system. This Expert system focuses on my sector of Finances and how different people in finance can benefit from AI. This system does a few things:

- It offers users recommendations on which type of investment account is best for them.
- It gives them different metrics that they can self identify with to find the best account type for them.

My system also expands on the expert system we were given in class. One of the largest and most beneficial changes I made was to allow users to enter only part of one of the financial consideration factors to identify with. Users who align with 'prefer upfront tax savings' can simply enter 'tax savings' or 'upfront tax', and still successfully match with the account that accommodates for that.

In an attempt to make this system more satisfying for humans, the system also offers multiple account type recommendations, a feature that would have been very helpful for diagnosing sicknesses. This satisfies the human desire to know all considerations that were made, since at the end of the day people often distrust AI and prefer to make the final decision for themselves. An example would be if a user entered "income less than 100k". This is fitting for both Roth and Traditional IRAs, and user will receive both account types as recommendations. Users also see how many matches a specific account had

As we continue learning about AI, I consider the ethics behind creating a system like this. My main concern was biases, and to mitigate any unforeseen biases I factored out things like race and gender which are typically included when analyzing financial performance of different accounts for individuals with varying race and gender.

Decision Tree:

Decision Tree

Welcome → Quit

View Balance → Go Back ← Transaction

Checking | Savings | Total Balance

Withdraw   Deposit