

MCIT 591 Investment Planning Statement (IPS) Planner

Completion Date

5/10/2019

Project Introduction

MCIT 591 Investment Planning Statement (IPS) Planner (“ the Program”) is to help the user understand the investment return and risk objectives, as well as providing recommended asset allocation and corresponding portfolio return and risks based on the user’s risk tolerance.

Team 44

Mengxue (Kristy) Li : designed and built the code to display the product panels, buttons, layout, and formats; expanded error checking capabilities to be more thorough; performed the quality control of the product from the user interface and experience perspective.

Pradeep Ramachandran : integrated the design code and the finance algorithms; built the logics for data collecting, processing, and output; wrote the J-Unit tests; built error checking functionality in to program, performed the quality control of the product from the data collecting, processing, and output perspective.

Yubei (Eva) Liu : drafted the proposal and written deliverables of the project; built the finance algorithms; conducted research on the underlying historical finance data and the questionnaires; wrote the J-Unit tests; performed the quality control of the product from the finance and legal perspective.

Link to Github Repository

<https://github.com/UPenn-CIT599/final-project-investment-policy-statement.git>