AssetLink AI Engineering Task

# Instructions

Video instructions: <https://www.loom.com/share/c09025c9034645778334638c48b29097?sid=d2372fef-b4ea-42d5-b2f9-e9166b7877cf>

This folder contains a file called AdvizorPro\_Person\_04.24.2024-1.csv. Your task is wto build a system to analyze the data using RAG-based LLMs

1. You can use any data infrastructure you want (Postgres, BigQuery, etc) to store the data.
2. Using the CRD column from the CSV file, you can find and merge their data from <https://brokercheck.finra.org/>
3. Using the LinkedIn column from the CSV file, you can find and merge their data from <https://rapidapi.com/rockapis-rockapis-default/api/linkedin-data-api>, you also have the option to scrape it
4. You will probably need SQL to join this data. You can use any ETL process you like.
5. Lastly leveraging some LLMs (ChatGPT, Gemini, etc), can you build a chatbot that answers questions about the data
   1. We should be able to put in a user’s name or CRD number and get back information on that person
   2. We should be able to ask questions based on columns in the CSV and data from LinkedIn and BrokerCheck

Sample questions?

1. Tell me more about <advisor name>?
2. What schools did <he/her> go to?
3. Do they have any disclosure? If so how recent and what was the dollar amount?
4. How do they work for?
5. How many people work at <firm name>?

Reach out to me if you have any questions -> support@assetlink.ai