

CIS 2350: AI Chatbot Project Idea

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Our Idea:

To create a user-friendly budgeting chatbot that can:

- Generate personalized budgets
- Track current spending
- Assist with saving decisions



Hi! How may I assist you today?

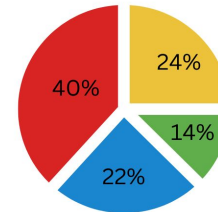
I would like to track my
spending over the last
month

Happy to help you with that.
Please upload your bank
statement for me to analyze.

Bank Statement.xlsx

Great, thank you. Now give
me a few moments while I
look through this.

Total Amount In: \$5,234
Total Amount Spent: \$4,543

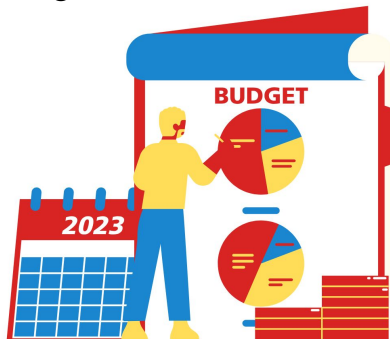


Top 3 Categories:
Rent: \$1800
Dining out: \$700
Shopping: \$400

Our Goal:

To create a one-stop shop for achieving your financial goals:

- **Budgeting:** Personalized plans based on your spending habits.
- **Spending Tracking:** Monitor historical and future spending.
- **Smart Saving:** Get tailored savings strategies.
- **Investing:** Insights for informed financial decisions.
- **Debt Management:** Plan for paying off loans and credit.
- **Financial Tips:** Learn key money management skills.



It seems you have some money leftover, would you like examples of great ways to save your money?

Yes! That would be very helpful.

Happy to help you with that.

1. You can start investing your money in stocks.
2. You could put the money into a 401K, IRA or other retirement account.
3. You can save this money in your Emergency Fund.

These all sound great! I want to save \$100,000 in my investment account by the end of the year. How can I adjust my spending to reach this goal.

That is a great goal! To reach \$100,000 in your investment account, I suggest cutting down on spending money on eating out and additional shopping spending. You should be putting aside \$1000 a month to reach this.

How will we achieve this?

We plan to use various sample bank statements to train our model on different categories of purchases, common budgeting strategies, and additional tips to help you manage your spending effectively.

Key Tasks:

- Train AI to create a sample budget based on historical spending habits.
- Train AI to assist users in setting realistic financial goals using popular budgeting techniques.
- Train AI to present budget reports and findings in clear, easy-to-understand language while remaining informative.

Any Questions? Suggestions?