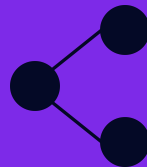


# FinWiz

**Get the Wall Street Edge**

**Team: Wrapper**

Cheryl Lee, Henry Hu, Victor Wei, Zoe Zhuang, Katelyn Vuong



# GitHub URL

[https://github.com/Henry-Hu-25/financial\\_wizard](https://github.com/Henry-Hu-25/financial_wizard)

# The Problem

**Existing Tools Too Expensive**

**\$15,000 yearly per  
person**

**Financial Analysis Too Manual**

**4+ hours per  
document reviews**

**Levitate your trading with FinWiz**

**Get the Wall Street Edge**

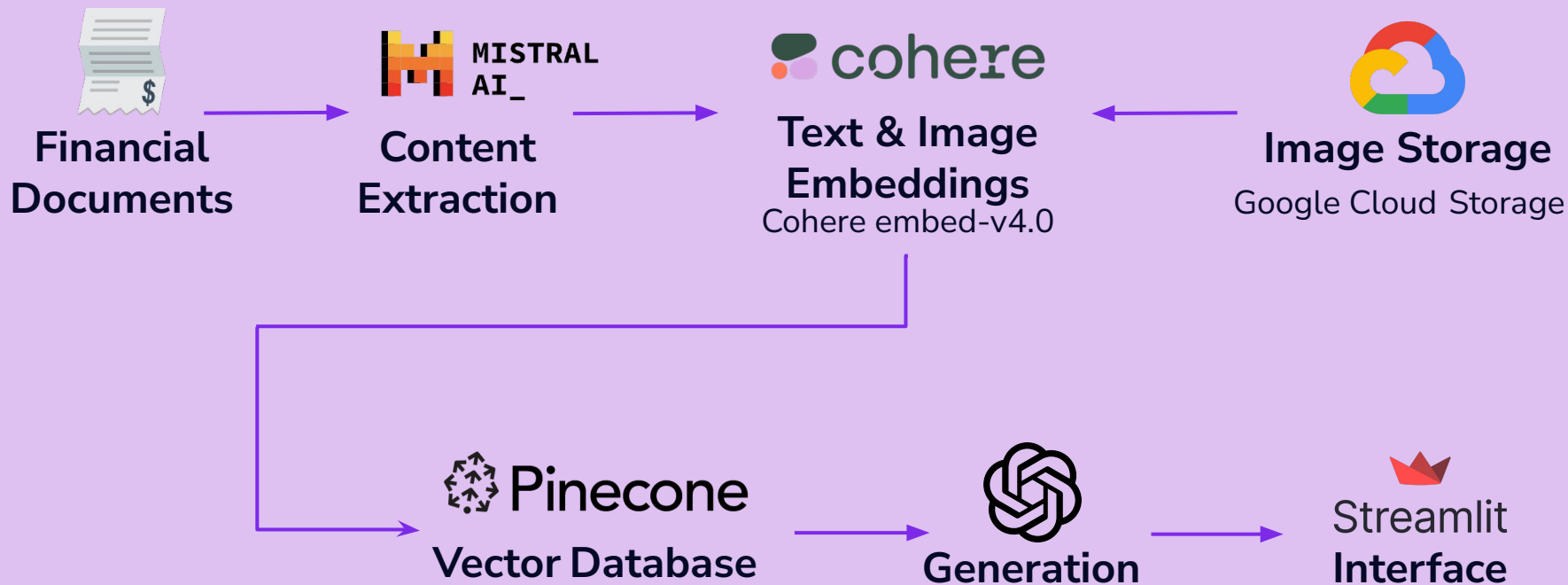
# What It Does

- Analyze financial documents
- Answer financial queries
- Extract financial metrics

# Why It's Useful

- Retail Investors: summarize 10-Ks for quick understanding
- Small institutional investors: quicker retrieval of key insights

# Model Pipeline/Architecture





# Live Demo





# Challenges

## Limitations of Smaller LLMs

- Reasoning capacity
- Struggle with interpreting table structure

## Multimodal Embedding

- PDF Format Complexity
- Table Recognition

## Retrieval System Fragility

- Company-specific retrieval strategies
- Lack generalizability



# What's Next

- Expand coverage to more companies & real-time market data integration
- Automate pipeline for continuous updates
- Computer vision for financial document processing

# FinWiz

**Get the Wall Street Edge**



# Features

## FinChat

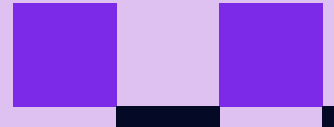
Users can choose from built-in queries or input a custom query.

## DCF Extract

Answer provides page number references and a snippet from the source

## DCF Analyze

Users can generate key financial insights dashboards



# Tech Evolution

## Phase I - Initial Pipeline

**Goal:** Build an end-to-end retrieval pipeline

**Model:** Gemma3-12B

**Data:** Apple & NVIDIA 10-Ks

**Limitations:**

- Limited to 2 companies
- No image/table support

## Phase II - Multimodal

**Goal:** Add image support + improve context

**Model:** GPT-4o

**Data:** Most recent Mag 7 10-Ks

**Upgrades:**

- Text + image embeddings
- Images stored in GCP

**Result:** Richer, context-aware retrieval across formats