

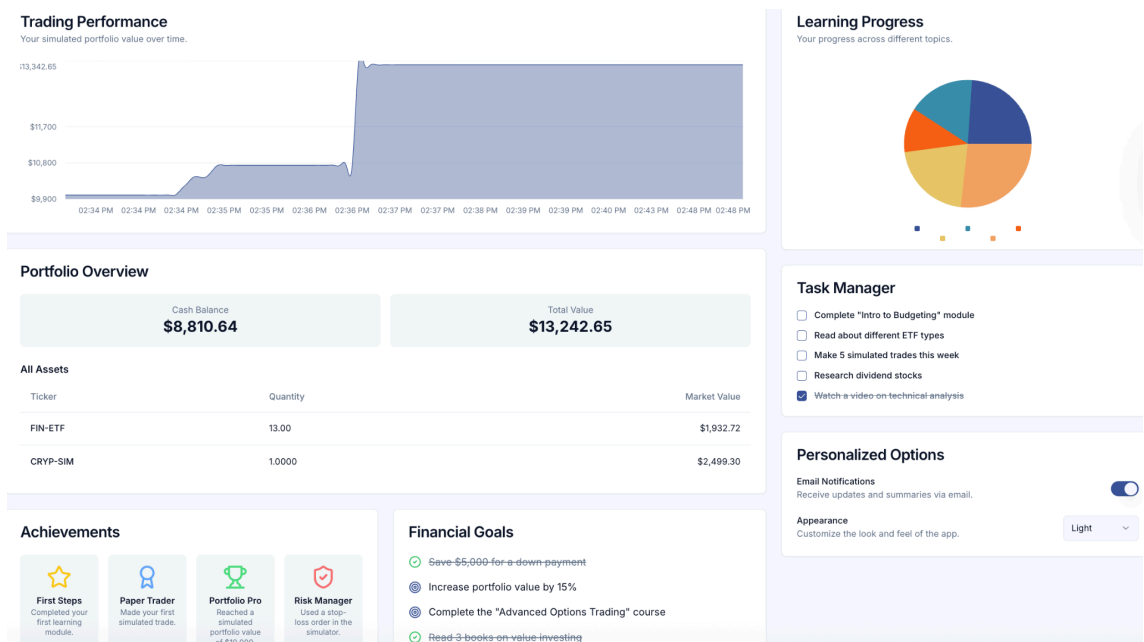
Christian Cordova

### Subset 3

I initiated the Firebase starter to begin developing my software prototype, and it was an illuminating experience. By that, I mean I was able to see the potential issues or roadblocks I would come across as a user who's on my application for the first time. That was the framework I approached this assignment with because if I get that part wrong, there's almost no chance of it ever picking up traction. Additionally, I consume media all the time, either intentionally or not, so I have a general understanding of what works, what I like, and what others like.

So here I created the dashboard page. It has the general information about the user, like their goals, tasks, graphs, and a performance chart. First, the performance chart only tracks the data from the simulated trading on the next page, so this data doesn't correlate with anything tangible. However, what this data can do is show the user their progress, although not as in-depth as I would need it to be. In the end, the product/software is going to produce high-value day traders and investors. That's what I want. So the performance chart would have to track the simulated trades and also break them down in depth with what went well, what went wrong, how to improve, and maybe even a real-life "textbook setup" example of price action of a well-known stock. Every piece of this software has to have value embedded within it. Right below the chart is a portfolio overview that tracks the adjustable account values. This would be fully customizable.

Now that I think about it, what would be cool is if the user were able to set up a simulated account that is specific to their trading interests. For example, if there were a beginner option that focused on futures and commodities, along with intermediate and expert options that set up a simulated trading account that trades the assets they're interested in with simulated money to get the practice reps in.



The next page I tinkered with was the learning page, which I believe is the most important. It didn't give me this look on the first go, so I tinkered with it and was able to get a relatively nice visual for the page where the user can set their current financial knowledge and their interests to create step-by-step learning course modules that cover the topic from their framework of interests and current financial knowledge. The response is around 3-10 steps that directly correlate to the user's dilemma and resources to take action. This is crucial because the user can go to the page and get straight into personalized lessons or videos that can fuel their desire and not bore them out of existence. Here, we can build a constant positive feedback loop where our user is learning and applying new concepts to their real-life situation. **An important highlight improvement would be focusing this page on learning AND financial literacy topics like deductions, business structure, and assets over liabilities.**

Additionally, any phrases, words, or concepts that need more elaboration can be explained with the topic explorer. The "Custom Path" and "Explanations" responses are in two separate sections so that they can clearly explain major and minor topics without being too wordy. This section will help explain topics and ideas clearly that can piggyback off the custom path response. This layout would also need to be improved to be more visually stimulating or at least pleasing so that we can retain attention for as long as possible.

**FinEd Trader**

- Dashboard
- Learn**
- Simulator
- Advisor
- Community

## Personalized Learning

AI-powered tools to guide your financial education journey.

### Create Your Learning Path

Tell us about your financial knowledge and interests, and our AI will craft a personalized learning journey for you.

**Your Financial Knowledge**

I'm an intermediate level investor. I've never placed a trade. I have invested and made money. I have a roth ira with 5k in it.

**Your Interests**

Crypto assets, long term investing, day trading

[Generate My Path](#)

### Your Custom Path & Explanations

#### Your Custom Path

- 1 Understanding Brokerage Accounts and Trade Execution
- 2 Advanced Long-Term Investing Strategies and Portfolio Diversification
- 3 Exploring the World of Crypto Assets: Fundamentals and Investment Considerations

Given your interest, this module will provide a comprehensive introduction to the rapidly evolving crypto asset landscape. We'll start with the foundational technology of blockchain, understand what distinguishes various cryptocurrencies (like Bitcoin and Ethereum), and explore emerging digital assets such as NFTs and DeFi protocols. You'll learn about the unique risks and volatility associated with crypto investments, methods for secure storage, and how to conduct due diligence before considering an investment. The

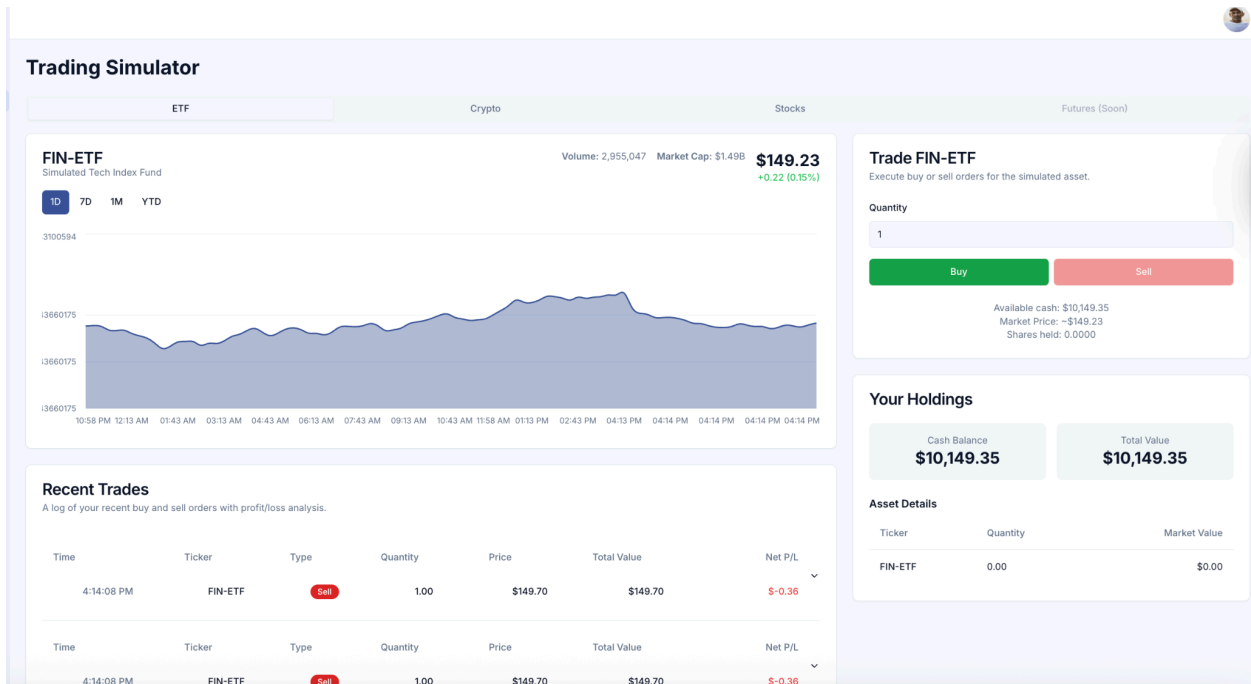
### Topic Explorer

Enter any financial topic you want to learn more about.

Next, we have the simulated trader section, where the user can put their skills into practice if they want to learn how to day trade. Here we have a simplified trading simulator that would help users get more accustomed to the world of trading. On this page, there is a chart selector that you can alternate from to trade ETFs, Crypto, and Stocks. This would ideally help the user who wants more specialized chart activity for their niche. One thing that I would want to improve here is to make the chart more action-based learning for beginners who have no idea how it works. It would be cool to have the screen hone in on all the items on the page and explain what they do

and how to use them. There would need to be more information, like volume and options to draw trendlines on the chart to learn price action. Furthermore, directly below the chart, we have the recent trades we took, along with the profit/loss and other general information.

**This page would be something truly special if it had special modules that run simulated trades with different methods of entry, exit, and risk management for users to practice key skills.**



I made the pop-up below so that the user can get used to journaling and keeping a record of their simulated trades and learn from past mistakes. Right now, this screen shows up when you buy and then click sell. This stops you from selling as fast as you should be able to. To solve this, there should be a more comprehensive way to lag your trades before and after. For example, before you buy/sell, you log what kind of trade you're taking and the strategy you're implementing, then once the trade is complete, you write or dictate what went well, wrong, and what to improve.

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Dashboard

Learn

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Log your reasons for this trade to analyze your strategy later.

Qty: 1.0000

Value: \$150.31

Est. P/L: \$0.53

Performance Tag

☒ Take Profit

The trade hit its predefined profit target.

☐ Stop Loss

The trade was closed at a predefined loss limit.

☐ Panic Sell

The trade was closed due to fear or market pressure.

☐ Strategy Shift

The trade was closed due to a change in your investment strategy.

Reason for Initial Entry

e.g., 'Technical breakout pattern', 'FOMO', 'Company earnings report'

Reason for This Exit

e.g., 'Reached profit target', 'Stop-loss triggered', 'Market sentiment changed'

Analysis.

Total Value

Net P/L

8 \$149.78 -

Sell

The AI Financial Advisor is a free, PhD-level finance manager that can answer any of the users' questions that will inevitably come up. I added personalization options so that the response comes out to be tailored to the needs of that specific situation or individual. I enjoy the directions being laid out in steps because that makes it easier for me to grasp one concept at a time and avoid overstimulation. Each response is useful; however, it's missing the engaging aspect of it. Maybe infographic videos generated by AI could solve this problem. Or simply referencing existing well-researched videos on YouTube to retain the attention.

Just maybe even implement a scroll section where users can discuss and dive into classic literature, concepts, and funny memes or videos about finance. There would have to be a great effort to eliminate bots and spam to promote growth and collaboration.

AI Financial Advisor

Financial Tool Advisor

Get AI-powered recommendations for investment tools based on your profile.

Personalization Options

Age

e.g., 30

State

e.g., CA

Gender

e.g., Woman

Pronouns

e.g., she/her

Financial Goals

e.g., "Save for retirement", "Buy a house in 5 years"

Or try one of these prompts:

I want to save for retirement in 20 years.

I am saving for a down payment on a house.

I want to build a diversified long-term portfolio.

I am interested in generating passive income.

Risk Tolerance

Low

Medium

High

Learning Progress

Beginner

Intermediate

Advanced

Get Advice

AI Recommendations

Your Action Plan

A step-by-step guide to help you reach your financial goals.

1

Establish a Tax-Advantaged Investment Account (Roth IRA)

As a 21-year-old with a long investment horizon, opening a Roth IRA is a highly strategic first step. Contributions to a Roth IRA are made with after-tax money, but qualified withdrawals in retirement are entirely tax-free. This means that all the passive income (dividends, interest) generated within the Roth IRA, and any growth from reinvesting those earnings, will never be taxed when you withdraw it in retirement. This tax advantage significantly enhances long-term wealth accumulation, making your future passive income streams much more efficient. For someone looking to build a robust passive income source, maximizing tax-free growth and withdrawals is paramount.

Account Setup

2

Invest in Diversified Dividend Growth Exchange-Traded Funds (ETFs)

3

Explore Real Estate Investment Trusts (REITs) via ETFs

4

Systematize Regular Contributions

5

Implement Dividend Reinvestment for Accelerated Compounding

6

Regularly Review and Rebalance Your Portfolio

Finally, we have the community page where we will promote user blogs, ideas, and the latest economic news that pertains to the user. I would most likely keep the community tab separate from the not-yet-implemented “scroll” tab. This is because I want to keep this page as educational as possible. By fact-checking each post and engaging with the authors, we could promote the most accurate and relevant information and give our authors the credit for their work.

FinEd Trader

Dashboard


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Community Forum



Top 5 Tech Stocks to Watch in Q3

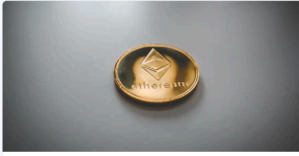
MarketMaverick

The tech landscape is constantly evolving. Here are five companies I believe are positioned for significant growth in the coming quarter, based on their recent earnings reports and market trends. Let's...

156

36

Share



Beginner's Guide to Understanding Crypto Wallets

CryptoClara

Diving into cryptocurrency? The first step is securing your assets. This guide breaks down the difference between hot wallets, cold wallets, and which might be right for you. Ask me anything!

130

2

Share

How to Analyze a Company's Balance Sheet

ValueInvestor

A balance sheet can tell you a lot about a company's financial health. I'll walk through the key components like assets, liabilities, and equity, and what to look for when doing your own research.

137

24

Share

The Psychology of Trading: Avoiding FOMO and FUD

ZenTrader

Your biggest enemy in the market is often yourself. Let's talk about the psychological traps of Fear Of Missing Out (FOMO) and Fear, Uncertainty, and Doubt (FUD), and strategies to keep a level head.

160

13

Share