

Investment Policy Statement Generator

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Existing Iteration 1 Feature

- Questionnaire about Risk Tolerance

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Risk Tolerance Survey

Risk tolerance is the degree of variability in investment returns that an investor is willing to withstand in their financial planning.

To determine your risk tolerance please answer the questions below.

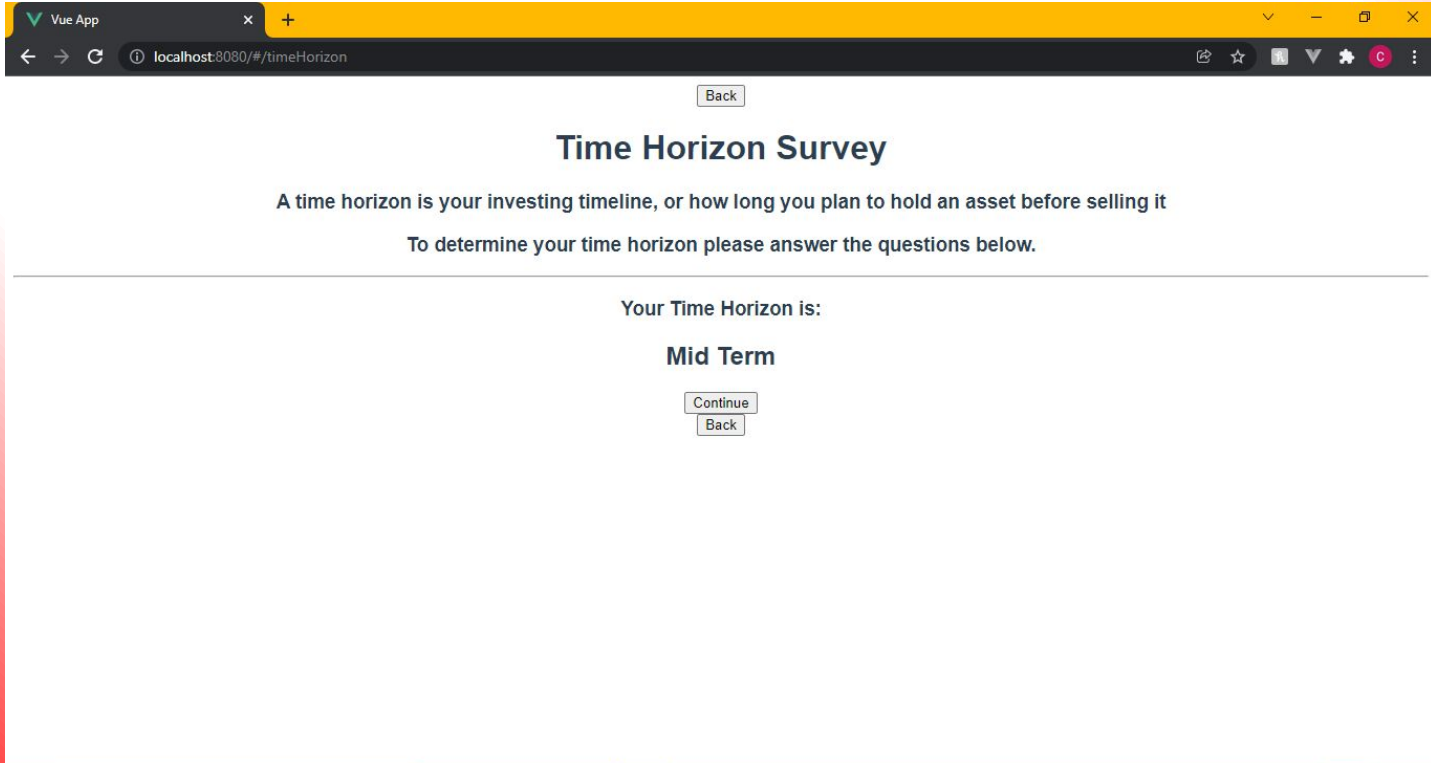
I would describe my knowledge of investments as:

- ☐ None
- ☐ Limited
- ☒ Good
- ☐ Extensive

Next

Iteration 2 Features

- Time horizon section in the questionnaire



Vue App

localhost:8080/#/timeHorizon

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Time Horizon Survey

A time horizon is your investing timeline, or how long you plan to hold an asset before selling it

To determine your time horizon please answer the questions below.

Your Time Horizon is:

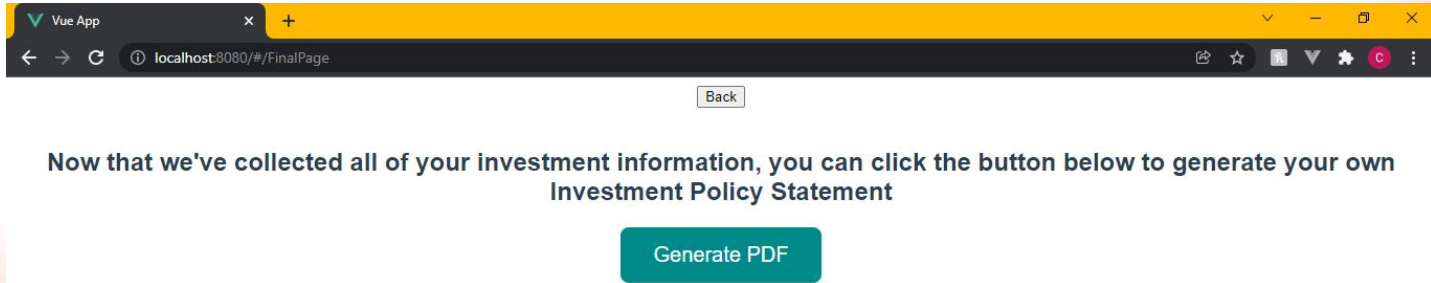
Mid Term

Continue

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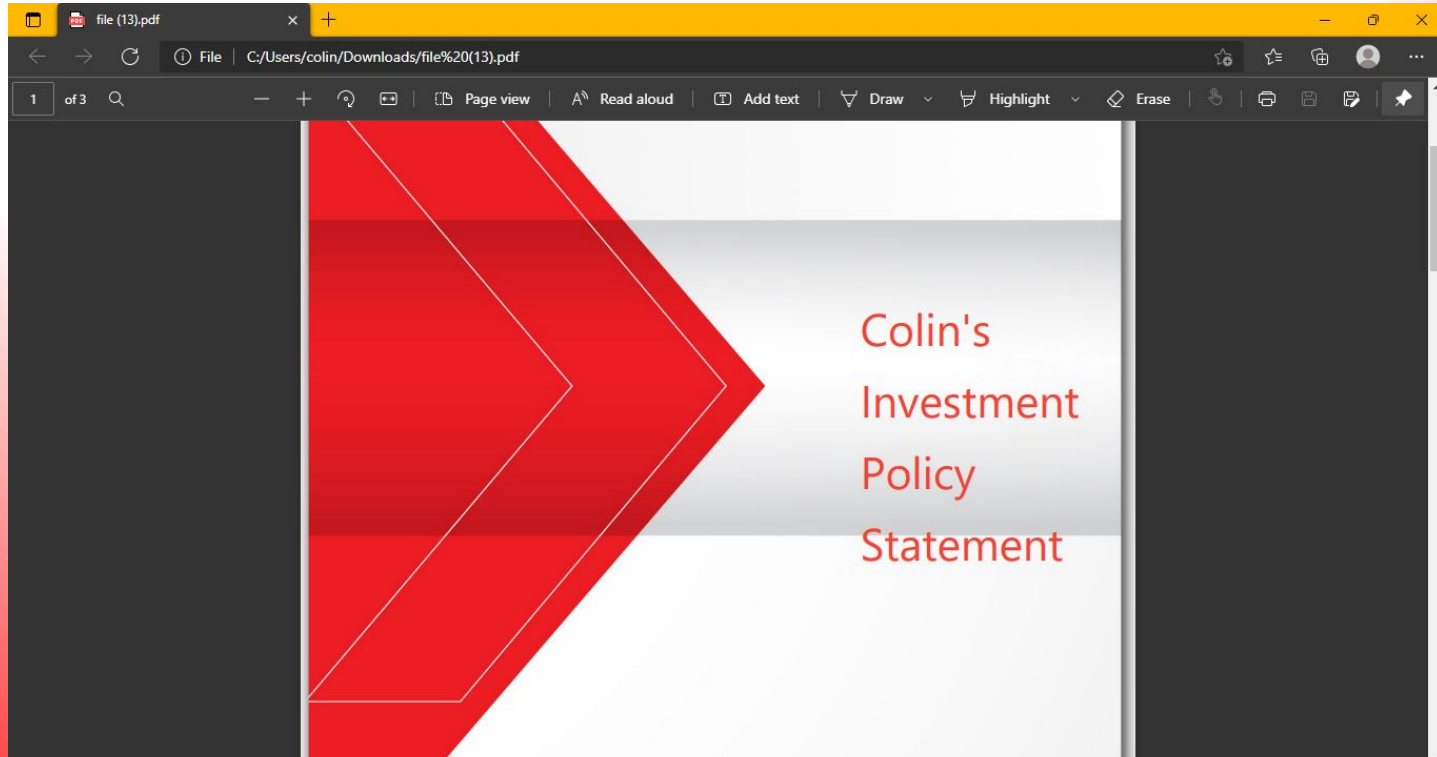
Iteration 2 Features (Cont.)

- Creation of a PDF document populated with data from the frontend questionnaire



Iteration 2 Features (Cont.)

- Creation of a PDF document populated with data from the frontend questionnaire



Iteration 2 Features (Cont.)

- Docker support as an alternative to manually building the project.



Containers / Apps



Images



Volumes



Dev Environments **PREVIEW**



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RUNNING PORT: 8080



backend

RUNNING



backend_ipsserver_1 [ipsserver](#)

RUNNING PORT: 5000

Student Mentor Feedback

- Evan played a much larger role in helping us resolve bugs and issues in this iteration when compared to last iteration.
 - This is because we utilized him more, not because he was previously unwilling.
- Evan was happy that we were able to reach functional code this iteration. He believe we're on track to be ready for integration with Cheetah's API for next iteration.
- Evan advised that we work over break and continue to utilize him, as connecting to the Cheetah API might prove more difficult than we're budgeting for.

Client Feedback

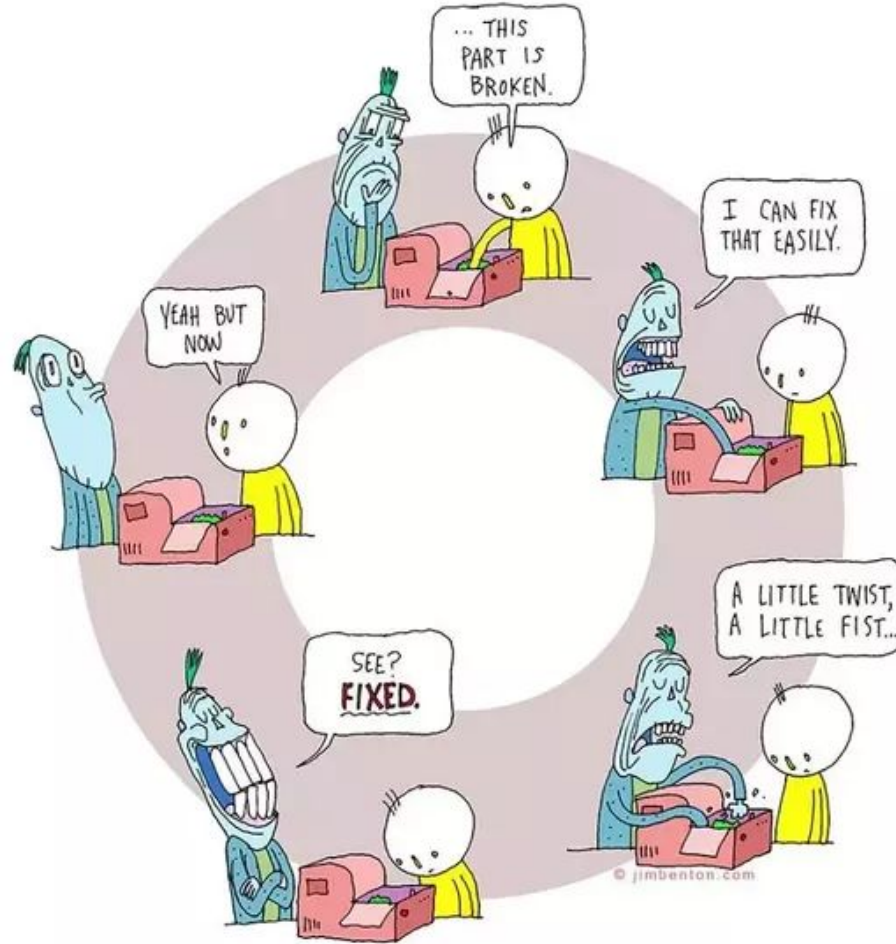
- AccuTech was happy with where we were this iteration, despite being a tad behind what we had initially (ambitiously) planned with them.
- AccuTech mainly discussed going forward with us during our meeting with them, so we did not have much to change afterward.
- AccuTech mentioned some features that would be great to get around to adding in the upcoming iteration, such as:



Planned Iteration 3 Features

- **FR5:** Connect with AccuTech's Cheetah™ API
- **FR7:** Allow user to input their existing personal capital
- **FR8:** Add asset allocation section to questionnaire & PDF
- **FR9:** Alter IPS to read like a paragraph rather than raw information.
 - (This is a stretch goal for this iteration. “Gravy” as AccuTech put it.)

The Funny



and Relatable™