



**BALL STATE**  
UNIVERSITY  
Computer Science

# InvestAway

## An Investment Policy Statement Generator



Made by:

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### Purpose:

An Investment Policy Statement ("IPS") is a document used by an investment manager to specify how an investor's wealth and investments are to be managed.

Accutech tasked us to create a software to speed up the process of generating an IPS document.

### Client Information:

Accutech is a company local to Muncie, Indiana that is committed to helping others succeed. They create banking and trust management software solutions for others.

### What we learned:

- Making maintainable software is difficult
- Requirements are difficult to collect.
- Software is a fun challenge
- Software Engineering skills
- Real world experience

### Features:

#### Investment Goals:

- Allows the user to report their investment goals. It allows the investment manager to understand what their client is trying to accomplish.

#### Time Horizon:

- Allows the users to record their time horizon which states how long the user wants their money to be invested for.

Your Time Horizon is:

#### Risk Tolerance:

- Allows the users to record their risk tolerance which states how risky a user's investments should be.

Your risk tolerance is:

Moderately Aggressive

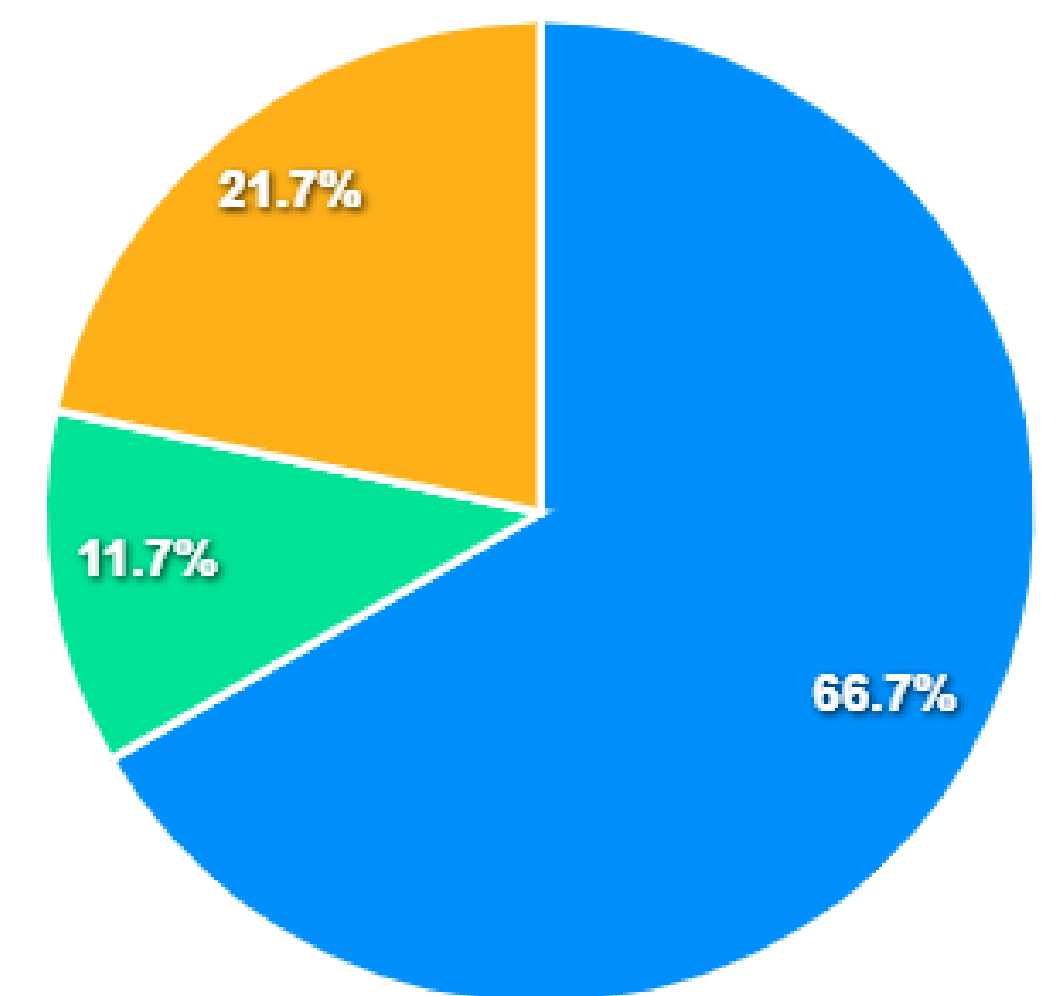
Your targeted average annual return on investment is:

0.098%

#### Asset Allocation:

-Allows the users to record their asset allocation which states how the users' investments are going to be divided.

● Stocks ● Bonds ● Cash



#### PDF Generation:

-Once the user is finished their IPS will be generated with all the information that was collected by the software and it will then be downloaded as a PDF on the user's computer

#### INVESTMENT POLICY STATEMENT

Kaleb's Investment Policy Statement

Friday, 08 April 2022

Client Name	Kaleb
Income	\$6860
Personal Capital	\$4500
Emergency Funds	\$41600
Risk Tolerance	Moderately Conservative
Time Horizon	Moderately Long Term

Scenario	Return on Investment
Average	\$409.50(0.091%)
Best Case	\$121.50(0.027%)
Worst Case	\$562.50(-0.125%)

Category	Holdings
Cash (15%)	\$675
Stocks (45%)	\$2025
Bonds (40%)	\$1800

#### Your Investment Strategy

You have chosen to invest a personal capital of \$4500 to accomplish your goal(s) of undefined. You have also decided that you want to stay invested for a Moderately Long Term time horizon. Using both

### Tech Stack Used:

- Frontend: Vue.js
- Backend: .NET Core, Docker

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