



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 users to record their investment goals. It allows the investment manager to understand what their client is trying to accomplish.
e.g., Retirement, Buying a Home, Starting a Business.

Time Horizon:

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

Risk Tolerance:

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

Your risk tolerance is:

Aggressive

Your Average annual return on investment is:

9.9%

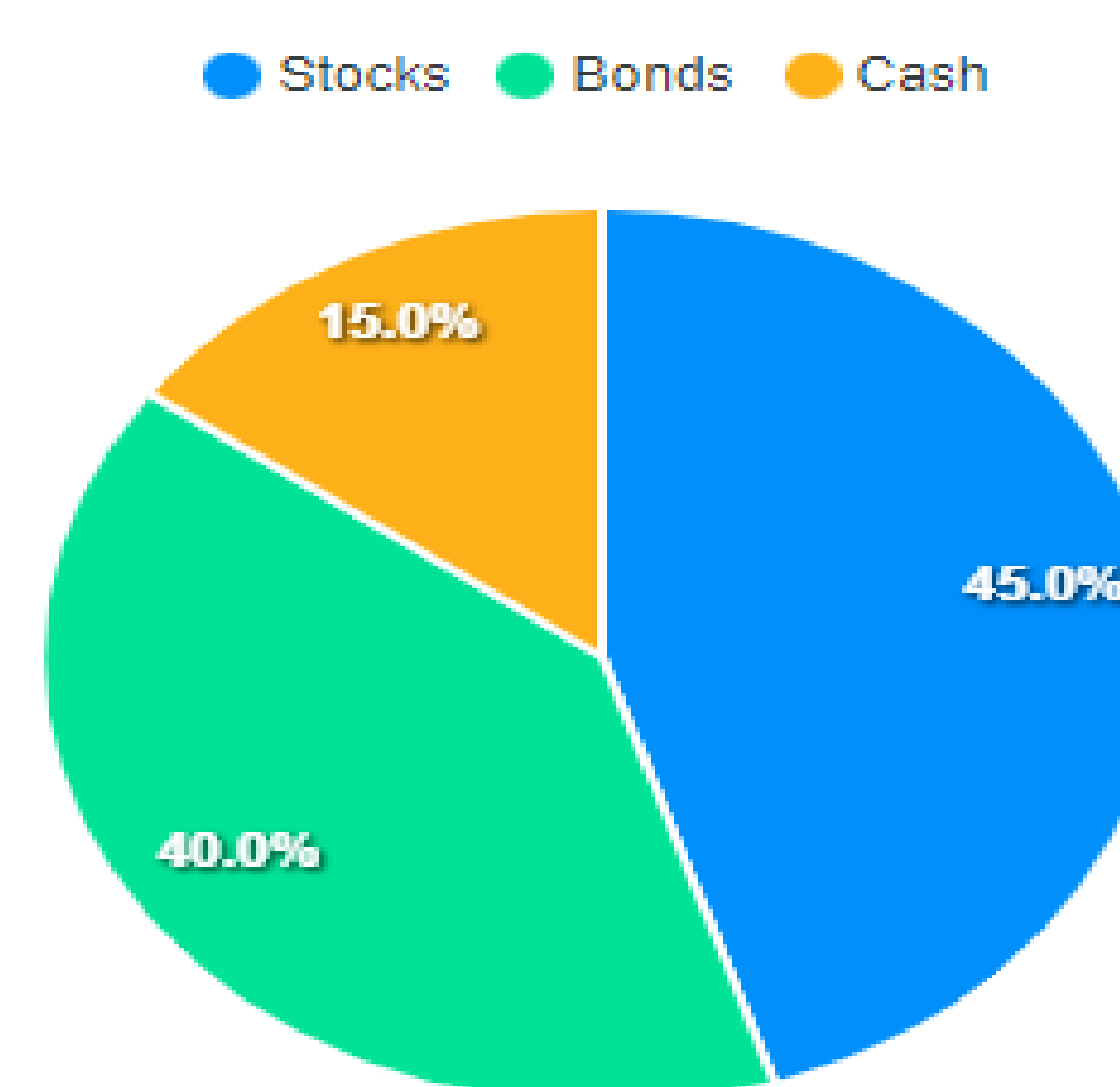
Based on your personal capital of \$10000 we can expect an average annual return of \$990

Best case would be an annual return of \$3990 (39.9% increase)

Worst case would be an annual return of -\$3600 (-36.0% decrease)

Asset Allocation:

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



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.

Tech Stack Used:

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

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