Final Project Documentation
for UTM CSCI 352

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Abstract

This Project will be a financial advisor type app, currently it has a temporary name: Edward after Edward Jones. You can give it your salary, location, and tax information and it will provide you with ways to reduce taxable income and responsibly invest some of your savings. The target of this application is the general consumer who is interested in learning about personal finance and ways that they can maximize their take-home income. So far we have outlined some of the major goals of our app.

1. Introduction

This project is an application anyone can use to help then plan their budget, calculate taxes, and get advice on how to responsibly invest their money. This application targets everyday consumers and anyone with an income stream.

The user will be able to receive financial advice and budgeting tips that are dependent on the user's salary, spending habits, and various other factors. The information given to the user is intended to help the user become financially responsible and generally more aware of what they are using their money for.

1.1. Background

This application may include large amounts of financial jargon such as marginal tax rates, adjusted gross income, etc. We aim to make definitions and explanations of these terms available in app, so we can make this information more accessible.

1.2. Impacts

This application should impact the financial literacy of its users, since financial education is sorely lacking in most education programs.

1.3. Challenges

We expect some headaches when we start to implement the tax laws and regulations since it will be time consuming to get everything correct and easily changeable.

Record keeping of money transfers will likely be an issue and well as potential runtime lag, since it will likely be doing lots of math.

The user interface and general design will be a time consuming task that will take many iterations to come to a consensus on.

2. Scope

At the completion of this project the end user will be able to enter information that will affect their tax status and the app will give them financial advice. Once the app meets the needs for a majority of the US general population it could be considered complete.

2.1. Requirements

The following requirements were generated based on the information needed to make financial advice.

2.1.1. Functional.

- Each user will have a profile that contains information about the user's net worth, salary, and user transactions.

2.1.2. Non-Functional.

- The user will have an account number, password, and other private information.

Use Case ID	Use Case Name	Primary Actor	Complexity	Priority
1	View Profile	User	Low	1
2	Salary	User	Low	1

TABLE 1. USE CASE TABLE

2.2. Use Cases

Use Case Number: 1
Use Case Name: View Profile
Description: The user on our application wishes to view their account and the information contained in there. They will click on the "View Profile" button. Which will then refer them to their profile screen with their information contained in it.

1) User wishes to see their account profile.
2) User clicks on the View Profile button.
3) The user is directed to the profile page where they can view their information

Termination Outcome:

Use Case Number: 2
Use Case Name: Salary
Description: The user in the application's home screen can tap on this button to view their current salary and how much they are earning, along with their paychecks and incoming and outgoing payments.

1) User wishes to see their salary.
2) User clicks on the View Salary button.
3) The user is directed to the Salary page where they can view their information

Termination Outcome:

2.3. Interface Mockups

We plan to include a wireframe diagram in future editions of this document showing the general layout of the application.

3. Project Timeline

We will add project timeline in the next update.

4. Project Structure

We will add the project structure in the next update.

4.1. UML Outline

We will generate a UML Outline in next weeks deliverable.

4.2. Design Patterns Used

To do next submission.

5. Results

We have a general idea of where we want our project to head towards. We will be brainstorming more ideas and will document them as we complete each goal that we have set for the next upcoming deliverables.

5.1. Future Work

The next steps are to create a UML diagram of the project and get a minimum viable product working that allows the user to submit a salary amount and returns their predicted after-tax income.