Wealth Path (Financial Planner)

What This Project Is About

This project develops a digital onboarding platform for financial planning clients. It replaces manual email exchanges and data entry by guiding clients through structured forms to collect their financial goals and current position, automatically populating the EFA Template, and streamlining meeting scheduling.

Example of manual work :

1. Email them back and forth asking questions
2. Manually type their answers into a Google Sheet (the EFA Template)
3. Schedule a meeting with them

What We are Building

You're building a **website/web application** that does all this automatically:

Step 1: Client Signs Up

- They visit your website
- Fill in: Name, Email, Password
- Create their account

Step 2: They Fill Out Forms

Instead of emailing back and forth, they fill out organized forms on the website:

Form Section 1 - Financial Goals:

- "How many kids do you have? When will they go to college? How much will you need?"
- "When do you want to retire? How much money per month?"
- "Do you want to save for travel? Buy a vacation home?"

Form Section 2 - Current Money:

- "How much is in your 401k?"
- "Do you own a house? What's it worth?"
- "How much in savings?"
- "What insurance do you have?"

Step 3: System Does the Work

- The website automatically takes all their answers
- Puts them into the Google Sheet (EFA Template) in the right places
- Shows them a link to schedule a meeting

Project Proposal

Project Proposal.pdf

Project Requirement Document

Financial_Planning_PRD.pdf

Business Requirement Document

Financial_Planning_BRD.pdf

Questionnaire for the Clients

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https://docs.google.com/document/d/1Kx3suSlKJ9rUGf7kvNlSysbtAAzZT-HLadm2vxbVX-E/edit?tab=t.0#heading=h.d9ffauuph4u1

CASE STUDY

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CALCULATIONS

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Minutes of Meeting

MOM -1
https://docs.google.com/document/d/1BwABfpREhabC7_zPc6DvNxym4p_OytiQjduszdOjncU/edit?usp=sharing

MOM - 2
Discussed about Final Dashboard had to fix few things
https://docs.google.com/document/d/14HuIxbxjnHg-nXVs860o4PtalqbLfZJcIT7LKk-MUzY/edit?usp=sharing

MOM - 3

1. 2.3 Retirement playing - Need to add one more calculation for inflation- Adjusted annual income required at retirement

    a) Monthly requirement at retirement age is not needed

2. **Current Growth Strategy (Offensive)** on this page under Retirement accounts remove all the 'after tax'

3. Need to add Section 4 called Saving VS Spendings use this.

Context	Prompt
https://docs.google.com/document/d/1eI48f74zTsmWqiHh7nHR8OWqtj3LqG2Ehl-bPhBZdgU/edit?usp=sharing	https://docs.google.com/document/d/1R0hOraSZGIN-DCeWtBtxAvsK60guPUIkwnCI3JbpkHg/edit?usp=sharing

MOM - 4
FIxed
Financial Goals Section 1
Section 2 offensive
Section 3 defensive strategy

https://docs.google.com/document/d/1yeGIOtfeIKa5o1UMmmvKtpWRzqrsieu26WE2Pn7KOjkq/edit?/d/1bt6LPt8q3RNs_WA_wMusp=sharing

MOM - 5
https://docs.google.com/document/d/1QsLBOpbtlY_SZh4fSsy2Wcst4X6tu?PB60fMDuFq4oJzsi1l2E/edit?usp=sharing
QM/edit?tab=t.0

https://docs.google.com/document/d/1JTZvapDsOr-

MOM -6
https://docs.google.com/document/d/1wxeI65PdcU77G0dorxug8YIaHTWHgkzMoRO2gL3y58E/edit?usp=sharing

MOM-7
https://docs.google.com/document/d/1RbsCsU-DcweqJRs4zx482cvTT6×62w4Rbh1E5eP63vU/edit?usp=sharing

prompts
https://docs.google.com/document/d/1zTqIqo57B4cr_g2vXdz0Fodjg_8mHQX1UbpPJwxEFfk/edit?usp=sharing

EPICS AND USER STORIES

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https://docs.google.com/document/d/1XccNUMN4-clC2XRsDIxdr1o_CT5IRxNW3WqkoasHLcY/edit?usp=sharing

https://docs.google.com/document/d/10c_tTyfrjE7e862Fg562dGDDCfW-dRPLFFxrg56NLFI/edit?usp=sharing

https://docs.google.com/document/d/1z2uwRldKuhMr75OuXowiQfeVmIkuV9iA1KIM7m-eBOo/edit?usp=sharing

This is all the Financial Calculations
https://docs.google.com/document/d/1dhEXDBkG6fDDDk4aD_27vz5EXt9iiG3PKhPgf9_TY-Q/edit?usp=sharing

build epics and user stories for gap analysis

Final Report

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PROMPT JSON
https://docs.google.com/document/d/15Ypw31CHk1MofbwOqHTU8TFB3OUq_zBpY0TCTtJiac8/edit?usp=sharing

Latest Requirement by Client

https://docs.google.com/document/d/10kvcdNvTPBsmBuaGWP797dkdVXUrM1mtlOrG79Mm-m8/edit?usp=sharing

https://docs.google.com/document/d/1lYa5qGGpq-L---PA5O-UshREJuLtljVrHFIQIRFocPM/edit?usp=sharing

project-config.json