

**Project Number:** 74

**Project Title:** AI powered financial advice

**Project Clients:** Cognitivo

**Project specializations:** Software Development;Web Application Development;Artificial Intelligence (Machine/Deep Learning, NLP);Big data Analytics and Visualization;Cloud Computing;

**Number of groups:** 2 group

**Main contact:** Cognitivo

**Background:**

Cognitivo's Prosopo product is a bionic assistant for financial advisers that allows the entire financial advice journey to be conducted without any manual typing or form filling. The product records all interviews and allows clients to input data through voice interactions, That data is abstracted into a knowledge graph that can be used to prefill forms, generate client responses, financial modelling and advice strategy generation.

**Requirements and Scope:**

To develop a generative AI component that allows natural language input to be transposed into an interactive financial model (a life plan of the client) which will be used to generate the advice strategy.

**Required Knowledge and skills:**

The project will allow students to develop hands on components that can be integrated into a production SaaS product.

Tools/languages used will include Data services using Databricks, Python, SQL, MongoDB, Knowledge Graph. Application development in ReactJS, NodeJS, Typescript, Express.

The financial model needs to be build using generic objects that can build cashflow schedules based on financial asset classes (e.g. investment property cashflows, mortgage repayments) as well as life events such as job income.

**Expected outcomes/deliverables:**

Deployable source code.

Solution architecture documentation.

User Guide