**Assignment 9.1: Milestone #1**

Joshua Kelbley, Louis Capps

Group 3 Willson

Bellevue University

CSD310: Database Development and Use

Professor Darren Osier

3 December 2023

Case Study: Willson Financial

Business Rules

Clients

Advisor

Assets (currency)

Transactions

Account

Accounts cannot have a negative amount of transactions

Accounts can have negative assets

There can only be one scheduled appointment per adviser at a time

Transactions must exchange assets

One transaction has one or more assets

Billing will contain one or more appointments

One transaction has one time

One client has one initial join date

One transaction can have a summary

All transactions follow the SEC regulations

One client has one account

One account can have many transactions

One account has many Assets

Some assumptions we made were that a client has an account where the account has all the information tied into it from the different factors. We also assumed that clients could have a negative amount of assets. We also assumed that there could not be a negative amount of transactions for a client or account.

ERD

