Project Overview

We are developing a mobile app for financial advisory services. This app will help users manage their finances, view investment portfolios, communicate with advisors, and access personalized insights. The app must be fast, secure, and user-friendly, with a modern and professional design.

Key Features & Modules

Module	Description
User Onboarding	Sign up, log in, and biometric authentication
Dashboard	Overview of financial status, key metrics, and insights
Portfolio Tracker	Real-time portfolio view (holdings, performance, diversification)
Financial Goals	Set and track goals like retirement, savings, college planning
Advisor Chat	In-app messaging or video call integration (e.g., Agora, Twilio)
Insights & Reports	Interactive charts, PDF statements, risk analysis
Notifications	Push alerts for performance updates, meeting reminders
Document Vault	Secure document upload and retrieval for clients & advisors
Settings	Profile, preferences, two-factor authentication, data export
Admin Portal (optional)	Role-based access for advisors to manage clients and reports

Security & Compliance

- Encryption: End-to-end for chat and data storage
- Secure Storage: Use Flutter Secure Storage or platform-specific keychains
- Compliance: Design for future support of standards like FINRA, SEC, and GDPR

Tech Stack

Layer	Technology
Frontend	Flutter (Dart)
Backend	Firebase / Node.js / Python (custom APIs)
Database	Firebase Firestore / Supabase / PostgreSQL
Auth	Firebase Auth, OAuth2 (Google, Microsoft), Biometric
Notifications	Firebase Cloud Messaging (FCM)
Storage	Firebase Storage / AWS S3
Charts	fl_chart or Syncfusion Flutter Charts
Video/Chat	Twilio / Agora / Stream Chat SDK

Deliverables

- Full Flutter source code (well-commented)
- Technical documentation (setup, architecture, APIs)
- UI/UX files (Figma or Adobe XD)
- Deployment instructions (iOS and Android)
- Post-launch support agreement (optional)