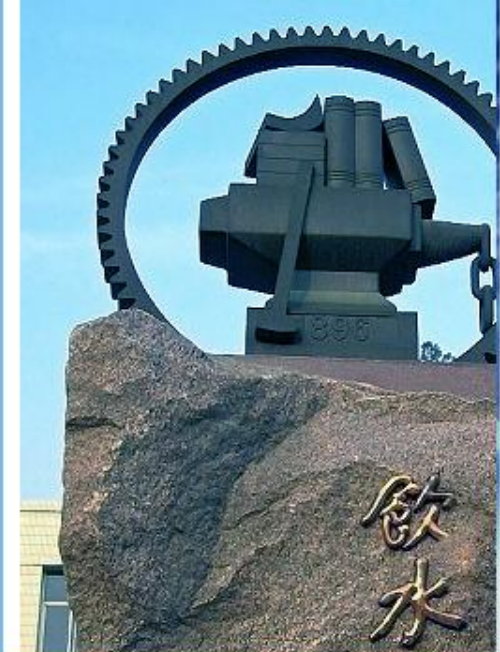


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Doctor of Personal Finance

A brief introduction of our system

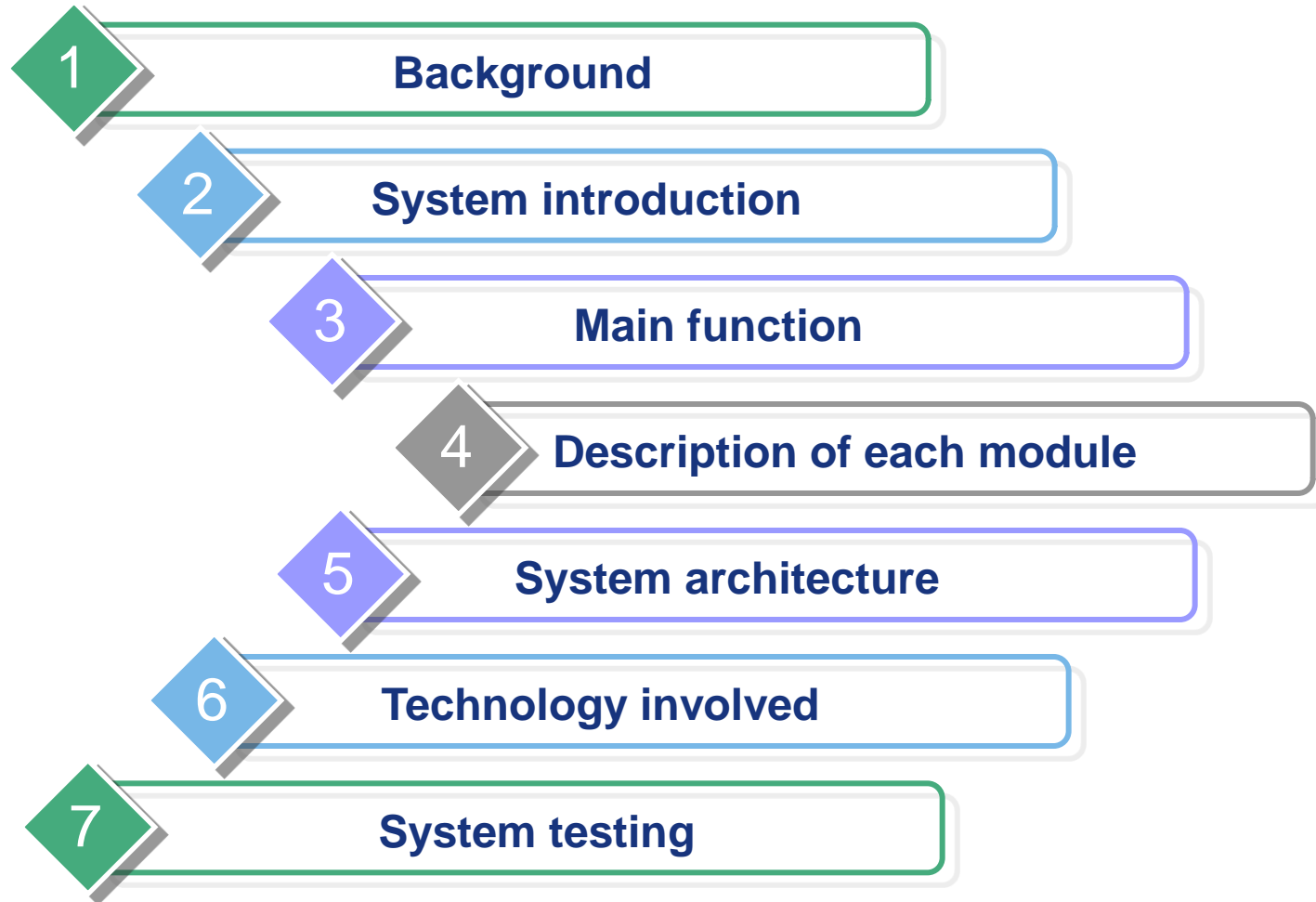
Doctor of Personal Finance

Candidate: School of economic and finance,
Xi'an Jiao university



西安交通大學
XI'AN JIAOTONG UNIVERSITY

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Background

- ❖ Personal finance has become hot in recent years, more and more people want to manage their wealth effectively through professional financial service, it's a new growing point from the perspective of commercial bank.
- ❖ Now, there are two kinds of personal finance service:
 - One is VIP like service, this kind of service can full-fill each client's specific needs, but it has a minimum requirement for customer's asset size, not mention the high cost and low efficiency.
 - The other one is preset service, the bank provide you a series of product. It is a low cost way for the commercial bank, but it can not satisfy each customer's individual needs.



System introduction

- ❖ Doctor of personal finance integrated information, network and computer technology into personal financial planning, it put financial planning knowledge and experiences from several CFPs (Certified Financial Planner) into financial planning logistic rules, and provide you with the suitable financial product through a complex calculation of its interest, risk and your specific needs. Our client can use the financial planning report to guide their actual investment, make their investment easy and effectively.
- ❖ We use B/S structure to make it easy for online use, after register, you can enjoy all kinds of first class financial service. Meanwhile, we also provide high quality financial information and an easy-quick search of all financial product for visitors. This new kind of service can satisfy our customer's individual needs, lower the cost, improve efficiency, and keep privacy of user's information. By implementing this system, commercial banks can take more share of wealth management market.



Introduction of each module

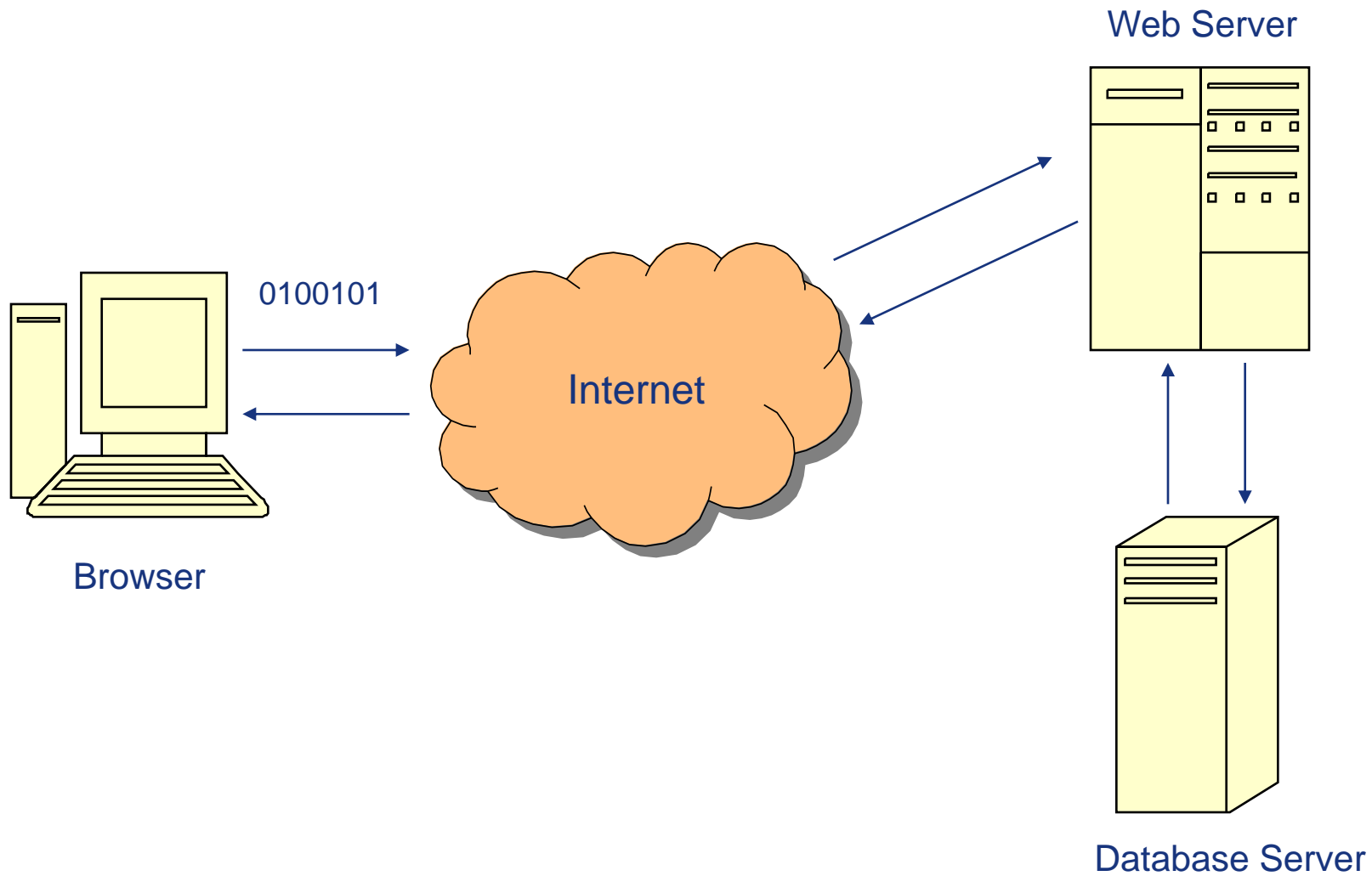
- ❖ Register and login
 - ❖ Financial planning
 - ❖ Product search
 - ❖ Online communicate
 - ❖ Finance news
 - ❖ Finance knowledge
 - ❖ Real cases
 - ❖ System management
- } Information



System Construction

- ❖ System architecture: Browser/Server
- ❖ Server: database— Store all kinds of client information, product information and finance information
- ❖ Our system appears like a website, it provide online service for clients who interest in personal finance planning, it can benefit more people than traditional face to face ways

Net Construction





Technology

❖ Develop environment:

- Programming language: Java、Jsp
- Database: MS SQL Server 2000
- Web server: Tomcat5.5
- Web application structure: Struts
- IDE: JBuilder2006



About us

- ❖ **School of economic and finance, Xi'an Jiaotong University**
- ❖ **Xi'an Jiaotong University rank among top 10 university in china, and the school of economic and finance is a pearl on the crown. We have nearly 100 professors, more than 80 postgraduate mentors, and 12 expert who have special provincial contribution and entitled for state department allowance. We have roughly 2600 register student and over 20 majors can award master or doctor degree.**



About us

❖ Our major

Information engineering of finance is an integrated major that consist of finance theory and application, computer technologyand management. It has high reqirement for software development ability and pratical skill.

❖ Development team

Our team member include postgraduates and undergraduates, they have different background include economics, computer and information technology, we integrate what we learn and put it into use, this system is a fruit of our teamwork

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Thanks



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