FinAssist™ Frequently Asked Questions (FAQ)

Version 1.0

This FAQ guide answers the most common questions about FinAssist™, our AI-powered financial management and advisory platform. It's designed to help individuals and small businesses get started, stay secure, and make the most of their financial insights.

General

What is FinAssist™?

FinAssist™ is an AI-powered personal and business finance assistant that centralizes budgeting, forecasting, investment insights, and compliance reporting through a single secure dashboard.

Who can use FinAssist™?

It’s built for individuals, freelancers, and small-to-mid-sized businesses that want better visibility into spending, savings, and investment performance.

What makes FinAssist™ different from other budgeting tools?

Unlike basic budgeting apps, FinAssist™ integrates directly with financial institutions and accounting platforms, providing predictive analytics, goal automation, and real-time advisory insights.

Is FinAssist™ available on mobile?

Yes. FinAssist™ is accessible via desktop browsers and the iOS/Android mobile app, ensuring full functionality across devices.

Account & Security

How do I create a FinAssist™ account?

Visit www.finassistapp.com, click Create Account, verify your email, and follow the guided onboarding steps.

What if I forget my password?

Use the “Forgot Password” link on the login page. You’ll receive a secure email to reset your password within minutes.

Does FinAssist™ support multi-factor authentication?

Yes. You can enable 2FA via SMS, authenticator apps, or physical security keys under Settings → Security Center.

How does FinAssist™ protect my financial data?

All data is encrypted end-to-end (AES-256). FinAssist™ complies with SOC 2 Type II, PCI DSS, GDPR, and CCPA standards.

Can I remove a connected financial institution?

Yes. Navigate to Connections → Manage Accounts and click Revoke Access. Your data will be deleted automatically.

Is my data shared with third parties?

No. FinAssist™ does not sell or share user data. Information is only used to provide financial analytics and improve user experience.

Features & Functionality

How do I link my bank or credit card?

In the dashboard, click Add Financial Institution, select your provider, and authenticate through a secure OAuth connection.

How often is my financial data updated?

Account data refreshes every 4 hours by default, or you can manually sync from your dashboard anytime.

Can I categorize or recategorize expenses?

Yes. FinAssist™ uses AI to auto-categorize transactions, but you can manually edit or merge categories anytime.

What types of reports can I generate?

You can create income statements, expense summaries, cash-flow reports, tax-ready summaries, and investment performance charts in PDF or CSV format.

How does the budgeting system work?

FinAssist™ automatically tracks spending and projects future trends. You can set spending limits, receive alerts, and view month-over-month performance.

Can I set financial goals?

Absolutely. Choose between templates such as Debt Reduction, Emergency Fund, or Wealth Growth, and FinAssist™ will forecast your timeline.

What investment features are available?

Portfolio tracking, diversification analysis, risk profiling, and AI-generated rebalancing suggestions. Integration with major brokerages is supported.

Business & Compliance Tools

Does FinAssist™ support small business accounting?

Yes. It integrates with QuickBooks®, Xero®, and Salesforce Financial Services Cloud for automated expense classification and cash-flow tracking.

Can I export data for my accountant?

Yes. Reports are exportable in PDF, CSV, or Excel formats, ready for tax preparation or audit purposes.

How does FinAssist™ handle multi-currency transactions?

The platform supports over 30 currencies and automatically converts using real-time FX rates.

Is FinAssist™ compliant with financial regulations?

Yes. It meets or exceeds global data-protection and financial-reporting standards (SOC 2, PCI DSS, GDPR, and local banking rules).

Troubleshooting & Support

Why isn’t my financial institution appearing in the list?

Some regional banks may require manual connection setup. Contact support@finassistapp.com and our team will guide you through secure linking.

My account balance looks incorrect — what should I do?

Perform a manual refresh. If discrepancies persist, verify that all accounts are active and reauthenticate the connection.

How do I report a bug or issue?

Submit issues via Settings → Help & Feedback or email our technical team directly. Attach screenshots when possible for faster resolution.

How can I contact customer support?

Support is available 24/7 via email (support@finassistapp.com), phone (1-800-555-0420), or live chat in the app.

Thank You for Choosing FinAssist™

We appreciate your trust in FinAssist™ as your intelligent financial companion. Our mission is to simplify financial management, empower smarter decisions, and protect your financial data with enterprise-grade security.