

# Deep Research Documents in Financial Intelligence System Project

## Canonical List of Deep Research Documents (1–30)

Below is the standardized list of the deep research documents (numbered 1 through 30) with their titles. Missing numbers indicate reserved slots where no document is currently provided, ensuring a continuous numbering from 1 to 30. The titles have been corrected for consistency in format, and misordered or duplicated numbering has been fixed (e.g. the Brand Book document reassigned to #26 to avoid duplicate #28):

1. **Financial Intelligence Layer – Cloud-Native Implementation Checklist & Scaffolding** <sup>1</sup>
2. **Tax Intelligence Guide for a Financial Entity Tax Map** <sup>2</sup>
3. **Implementation Guide: Financial Data System with Entity Registry**
4. **Blueprint for Forecasting Financial Time Series**
5. **Provider-Agnostic Economic Indicator Subsystem – Design & Implementation Guide**
6. **Unified Revenue and Expenses Engine: Implementation and Design Guide**
7. **Financial Calendar Heatmap: Technical & UX Specification**
8. **Reusable Interactive Chart Viewer Implementation Guide**
9. **Budget Viewer Module Implementation Guide and Specification**
10. **OKLCH-based Design Token and Color System for a Financial App**
11. **Next.js Live UI/UX Editing Engine Starter Project**
12. **Gmail Hub: Financial Email Intelligence Service – System Specification & Implementation Guide**
13. **DevOps Specification for Financial Intelligence System**
14. **Security & Compliance Framework for a Financial App**
15. **Data Quality and Observability System for Financial Data Pipelines**
16. **UI/UX Guidelines for a Responsive, Gamified Financial Dashboard**
17. *(No document – number reserved)*
18. **Multi-Agent AI System Architecture for Finance Management**
19. **Branding & Positioning Strategy for “Tunneling AI” (Financial Intelligence App)**
20. **Next.js Admin Screen for Tax Obligations**
21. *(No document – number reserved)*
22. **AI Agent Operations & Conversational Onboarding Guide (Financial Dashboard)**
23. **Observability & Data Quality Implementation Guide for the Financial Intelligence App**
24. *(No document – number reserved)*
25. **Fintech Dashboard Security Architecture & Implementation Guide**
26. **Brand Book – “OS Financeiro” (Next.js + Tailwind) (reassigned from duplicate #28 to #26)**
27. **UI/UX Design Specification for Financial OS Dashboard**
28. **Documentation & Knowledge Base System Design** <sup>3</sup>
29. **Tax Intelligence Extension (Binding Compliance) – Brazil Implementation Specification**
30. **Dual Personal and Professional Finance System Architecture** <sup>4</sup>

## Deep Research Documents by Module/Theme

This consolidated list groups the above documents by their module or theme. Each bullet indicates a major topic or system component, followed by the document numbers that relate to that area. This thematic organization helps clarify module ownership, highlights overlapping research areas, and can assist in assigning specialized AI agents to each module:

- **Core Architecture & Platform:** [1, 3, 30]  
*(Fundamental system architecture, multi-tenant design, scaffolding, and overall platform structure.)*
- **Financial Engines & Analytics:** [2, 4, 6, 9, 29]  
*(Domain-specific financial logic and analytics modules – tax computation and maps, forecasting engine, revenue/expenses engine, budget management, including tax extensions for Brazil.)*
- **External Integrations & Data Sources:** [5, 12]  
*(Integration with external services and data – e.g. economic indicators subsystem and email (Gmail) hub for financial data ingestion.)*
- **AI & Agents:** [18, 22]  
*(Artificial intelligence components – multi-agent AI system architecture and AI agent operations/conversational onboarding for the financial dashboard.)*
- **UI/UX & Design:** [7, 8, 10, 11, 16, 19, 20, 26, 27]  
*(User interface, user experience, and design system – including UI modules (calendar heatmap, chart viewer, budget viewer UI in #9 overlaps with financial logic), design tokens and color system, live UI/UX editing engine, general UX guidelines, branding and positioning strategy, admin UI for tax, brand book, and detailed UI/UX design specifications.)*
- **Security & Compliance:** [14, 25]  
*(Security architecture and compliance frameworks – covering application security, data protection, regulatory compliance measures, and specialized security design for the fintech dashboard.)*
- **DevOps & Infrastructure:** [13]  
*(DevOps and cloud infrastructure – CI/CD pipelines, deployment, and operational infrastructure specifications for the financial intelligence system.)*
- **Data Quality & Observability:** [15, 23]  
*(Data pipeline observability and quality control – systems for ensuring data integrity, monitoring, and quality checks across financial data workflows.)*
- **Documentation & Knowledge Base:** [28]  
*(Documentation systems and knowledge management – design of the documentation and knowledge base platform to support the project, including decision logs, runbooks, and integration of docs with AI assistance.)*

Each module/theme above groups related deep research documents, making it easier to identify which team or AI agent might own that area. This modular breakdown reveals where topics intersect (for example, **Observability** appears in both data pipeline (#15) and application context (#23)), and ensures that responsibilities (and any future AI agents) can be assigned with minimal overlap.

1 1-Financial Intelligence Layer – Cloud-Native Implementation Checklist & Scaffolding.pdf

file:///file-RuX9np3j2G5Xs7D8osWaWL

2 2-Tax Intelligence Guide for a Financial Entity Tax Map.pdf

file:///file-5qUBhH5yYsUTZHXh7g2AkR

3 28-Documentation & Knowledge Base System Design.pdf

file:///file-Kz9sV5wkG8fXKUJscVUh7W

4 30-Dual Personal and Professional Finance System Architecture.pdf

file:///file-AWUVzXBr2DMRYRGdSftNJm