**Project Charter: Brokerage Retirement Accounts Application**

Project Name: Brokerage Retirement Accounts Application

Project Owner: Shannon Musgrave

Created: June 1, 2025

Version: 1.0

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| Item | Response |
| Business Case/Vision | The Brokerage Retirement Accounts Application will address the need for small to medium-sized investment firms and individual financial advisors to efficiently manage client brokerage and retirement accounts. By transitioning from a limited console-based system to a modern C# WPF application, it will provide a user-friendly application, secure data handling, and persistent storage. The application will streamline account management, enhance security through encryption and hashing, and support dynamic account creation, reducing manual processes and improving client service delivery, thus offering a cost-effective, scalable solution compared to enterprise-level financial software. |
| Mission Statement | The mission will be to create a Brokerage Retirement Accounts Application to provide a dependable, secure, and user-centric platform for managing client investment accounts. By leveraging C# WPF with MVVM architecture, secure authentication (SHA-256 hashing), and encrypted data storage (AES), the application will ensure accurate account tracking, dynamic user management, and compliance with financial data security standards, enabling firms to focus on client success. |
| Project Team (members and roles) | Project Owner: Shannon Musgrave  Lead Developer: Shannon Musgrave  Data Specialist: TBD  UI/UX Designer: TBD  Quality Assurance: TBD |
| Success Criteria | Users can create, authenticate, and manage accounts with secure SHA-256 password hashing.  Supports CRUD operations for client accounts, including fields: Account ID, Client Name, Account Type (e.g., brokerage, retirement), Balance, and User ID.  Implements MVVM architecture for maintainable data binding and UI separation.  Provides real-time updates to account balances and transaction history.  Finished by deadline. |
| Key Project Risks | Security breach – High  Data persistence – Medium  Windows Compatibility - Low |
| Rules of Behavior (values and principles) | Open communication  Respect all ideas  Prioritize quality  Take ownership of responsibilities, tasks, and deadlines  Use Git for version control  GitHub for remote repository |
| Communication Guidelines | Utilize Microsoft Teams group chat, avoid sidebars  Respond to requests within 1 business day  Disagree respectfully with others  Maintain a presence in online discussions  Only relevant and professional discussions allowed on official messaging services |