**Project Scope Statement**

**Software Type: Financial Management System**

**Overview:** Our financial management system aims to empower individuals with comprehensive tools and resources for enhanced financial literacy, effective money management, optimized investments, credit monitoring, and seamless navigation of tax-related matters. The platform comprises four portals dedicated to different aspects of personal finance: Investment and Trading, Tax, Financial and Money Management, and Credit.

**User Side Features:**

* **Login/Signup:** Secure manual registration and login for user access.
* **Centralised Financial Portal:** Tailored central portal based on membership level.
* **Real-time Updates:** Receive real-time news updates across financial sectors.
* **E-Book Store:** Access diverse e-books with exclusive discounts based on membership.
* **Webinars:** Participate in educational webinars with tier-specific benefits.
* **Communities:** Engage in discussions with advanced features for premium and all-access members.

**Membership Tiers:**

* Basic
* Premium
* All-Access

**Credit Portal:**

* **Basic Membership:** Foundational credit education, real-time updates, and AI-integrated insights.
* **Premium Membership:** Exclusive access to credit monitoring, detailed reports, webinars, and discussions.
* **All-Access Membership:** Full participation in credit-related activities and community interactions.

**Trading and Investment Portal:**

* **Basic Membership:** Access to basic market insights, real-time updates.
* **Premium Membership:** Exclusive access to advanced analytics, trading capabilities, webinars, and discussions.
* **All-Access Membership:** Full participation in trading activities and community interactions.

**Money Management Portal:**

* **Basic Membership:** Access to foundational resources.
* **Premium Membership**: Exclusive tools, webinars, and community discussions on effective money management.
* **All-Access Membership:** Full participation in money management activities, webinars, and community interactions.

**Tax Portal:**

* **Basic Membership:** Basic tax education, real-time updates.
* **Premium Membership:** Personalized tax planning tools, updates on tax laws, webinars, and discussions.
* **All-Access Membership:** Full participation in tax-related activities and community interactions.

**Admin Panel Features:**

* **Membership Management:** View and manage members, track activity, and engagement.
* **Content Management:** Monitor and update educational content and real-time news.
* **Security and Data Management:** Ensure data encryption, compliance, and user data management.
* **Webinar and Community Management:** Moderate and manage discussions, address reported content.
* **Payment Gateway Integration:** Monitor transactions and resolve payment issues.
* **User Support:** Provide customer support and address membership concerns.
* **Communication Management:** Oversee communication features and address technical issues.
* **Analytics and Reporting:** Generate reports for continuous improvement.
* **Compliance and Legal Management:** Address legal matters and maintain transparency.

Our financial management system aims to empower individuals to make informed decisions about their finances through comprehensive tools, educational resources, and community engagement. With tailored portals and membership tiers, we strive to cater to the diverse needs of our users and provide a seamless user experience.

**Note:** Screen Overlay in all portals necessary along with AI integrations.