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CIS 344

Prof. Ramos

Personal Finance Coaching Database

I had the pleasure of making a database in MySQL Workbench. More specifically I created a database for people who want to work on their financial goals no matter where they start from. My friend Carlos works for an investment firm and they help guide people in the ways of money, financial responsibility as well as budgeting and setting attainable goals. Everyone can manage their money better and with the creation of this database and our coaches we can aid those ready to take the next step. Carlos told me that most people quit their financial goals within the first two weeks mainly because they are unsure of where to start. While creating my project I had to think about all the necessary data I would need to make this database work or at least begin. I decided to create a few tables as a guideline and work from there. I drafted my Chen Diagram as a blueprint for my database. I created four entities labeled them, 'Coaches', 'Clients', 'Accounts', and 'Goals'. Each of these entities were given attributes to hold specific data. In my Coaches entity I added the attributes coach ID(primary key), name, email, phone and the specialty of the coach such as "tax law" or "budgeting/saving." For Clients I added the client ID as the primary key in order to better keep track of our clients, followed by coach ID as the foreign key due to the relationship between these entities as Coaches can have many Clients or HAS many clients. I also added the client name, phone and email to keep their contact info up to date. For the Accounts entity I used account ID as the primary key, client ID as the foreign key

because clients can have/ OWN many accounts, the account type and balance to give ourselves a starting point. This allows us to get a general idea of what we can build off and how to utility current assets. Lastly my Goals entity with goal ID as the primary key, client ID as the foreign key as clients can have many goals and they also SET goals, the name of said goal and the target amount the client wishes to reach after following our advice and recommendations. I hit a roadblock when making my EER diagram via the UML tool within MySQL Workbench. I was struggling to make my foreign keys until I utilized the 'Reverse Engineer' option to generate the UML diagram after writing out my code where I created tables and inputted data. Using Carlos' advice I thought it best to keep my clients goals reasonable so that they may gradually grow their portfolios and budget their income better. I felt that the most important attribute in my project was the target amount as I feel that it's easier to keep a number in mind than a bunch of half-baked goals. It gives you a number to work towards without the pressure of living up to your own expectations. Carlos mentioned that those who truly wish to work towards their financial futures start small, achieving small goals even if that means saving an extra \$20 a week. Keeping this in mind I felt that having my coaches explain to clients how they can build up to their goals like taking a family vacation is not such a daunting task but can become fun for some. I myself have a great passion for personal finance and I think it's very important that everyone takes a look at their own spending habits, keeping track of income to get a better idea of where they are when it comes to expenses and finances. I hope to lead others on a path to financial stability and this database is just the beginning!