

**Team Members –**

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# FinViseBot

INSY-660-076 – **Team 10 Proposal**



# THE COMPANY

**13 MILLION  
CUSTOMERS!**

**JUST 2600  
ADVISORS**



**ONE OF THE  
LARGEST  
BANKS IN  
CANADA - 1817**



**~ 45,000  
BRANCHES**



# WHY A CHATBOT?

- **BMO Bank of Montreal** lacks a **personalized finance advise assistant** for their clients because of which they face challenges in availability especially during peak hours.

01.

## Lack of User Friendly Platform

They lack an efficient and user-friendly way to provide **personalized financial advice and assistance** to their clients. Their **competitors** such as **Scotia Bank** have personalized chatbots.

02.

## Unavailability of Current Systems

While the firm's advisors are knowledgeable, they **face challenges** in delivering timely and consistent advice to clients, especially during **peak times** or **outside of regular office hours**.

03.

## Collecting User Feedback

Currently BMO collects feedback via a **5 minute online survey**. The feedback collection must be **quicker for the consumer** and the bank **managers** must be able to see **Sentiment Score** about the customer reviews.

# POSSIBLE SCENARIOS

01.

## Investment Recommendations

- Investment goals
- Risk tolerance
- Investment horizon

02.

## Portfolio Analysis

- Portfolio Performance
- Risk Profile
- Market Insights

03.

## Loan Enquiries

- Payment plan
- Loan options
- Current status

04.

## Retirement Planning

- Recommended Savings Rate
- Investment Strategy
- Tax Efficient Retirement Accounts

