**Echo Group – Milestone 1  
Case Study: Willson Financial**

Assignment 10.2  
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**Business Rules:**

One CLIENT can have many ASSET\_UNDER\_MANAGEMENT  
One ASSET\_UNDER\_MANAGEMENT can only have one CLIENT

One CLIENT has one EMPLOYEE assigned (as Relationship Manager)  
One EMPLOYEE can have many CLIENT

One INVOICE is issued to one CLIENT  
One CLIENT can have multiple INVOICE

One CLIENT can have multiple TRANSACTION  
One TRANSACTION can only be assigned to one Client

**Assumptions:**

* We assume the following process:  
  1. New clients are saved in table *Client;* every client gets a Relationship Manager assigned (column *Relationship\_Manager* in table *Client*)2. Client transfers money to Willson Financial; the transfer is saved in table *Transaction*3. Willson Financial invests the client’s money; however, not necessarily the whole amount at once. Every investment is saved in table *Asset\_under\_Management*  
  4. The invoice is created based on the client’s average Asset under Management and the number of transactions
* The Invoice is based on the number of transactions (fixed amount per transaction) AND average Assets under Management
* If assets are disinvested, the *status* of the respective entry in table *Asset\_under\_Managemen*t is changed to “disinvested”
* Because June does not have a CFA, she does not have access to all records the way Jake and Ned do à The database privileges are defined in column *DB\_Privileges* in table *Employee*

**Initial ORD**

Diagram, schematic

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