Product Roadmap

# Timeline (Quarterly/Monthly)

Q1: Design and develop Risk Profiling Questionnaire Engine  
Q2: Implement Scoring Model and Suitability Ruleset  
Q3: Develop UI/UX, API integration with CRM and Product Catalog  
Q4: Build Reporting & Monitoring modules, finalize security & compliance audits

# Major Features / Epics

- Epic 1: Design and Develop Risk Profiling Questionnaire  
- Epic 2: Implement Risk Scoring Algorithm  
- Epic 3: Suitability Engine Logic  
- Epic 4: API Development and Integration  
- Epic 5: UI/UX for Advisors and Clients  
- Epic 6: Security, Compliance, and Audit Trail  
- Epic 7: Reporting and Dashboard

# Milestones

- Completion of dynamic questionnaire engine  
- Scoring logic and investor profile mapping operational  
- API-ready suitability engine integration complete  
- Advisor & client-facing UI/UX rollout  
- Compliance-certified audit trail module delivered  
- Reporting dashboards operational

# Themes (optional)

- Compliance and regulatory alignment  
- Automation and efficiency  
- Advisor and client trust through transparency  
- Scalability and integration readiness

# Dependencies

- Dependency on timely input from investment specialists for questionnaire design  
- Integration dependency with CRM and product catalog  
- Dependency on regulatory stability for requirements  
- Coordination with UI/UX teams for timely delivery

# Releases

- Release 1: Questionnaire and scoring engine  
- Release 2: Suitability ruleset and API integration  
- Release 3: Advisor/Client UI and compliance audit trail  
- Release 4: Reporting dashboards and monitoring tools

# Owner / Team

- Product Owner: Leads vision and roadmap execution  
- Development Team: Builds questionnaire, scoring, API, and reporting modules  
- Compliance Team: Ensures regulatory adherence  
- UI/UX Designers: Deliver advisor and client interfaces  
- QA & Testing Team: Validate functionality, performance, and compliance