

There will be an option to create a project. When user click on create project it will show like below imag:

Create a Project

Project Name*

Client Name*

 Asset Class* ▼

Source Document*

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Cancel Create

Harvard Endowment DDQ BlackRock Alternatives R

After giving all input data il will look like below:

Create a Project

Project Name*

Client Name*

 Asset Class* ▼

Source Document*

 X

Cancel Create

Harvard Endowment DDQ BlackRock Alternatives R

After creating the source document. There is a pdf view type editor.

Maryland State Retirement and Pension System
Due Diligence Questionnaire - Private Funds

Detailed Questions

1.0 Firm: General Information

1.1 Provide a brief overview of the Firm, including information on the founding, subsequent history and information on any predecessor firm and/or parent firm. Describe any plans to change or expand the Firm (entering/exiting business lines, office locations, etc.) over the next 5 years.

1.2 Provide an overview (including chart) of the ownership structure of the Firm, its relevant investment advisors and any parent organization. Include details on the timing and rational for each significant ownership change. State any limitations on the ability of the Principals (as defined in Appendix B) to assign their interests in the General Partner. Include percentage ownership, ownership vesting schedules, and any changes in ownership over the last 10 years.

1.3 Provide an overview (including chart) of the management/organizational structure of the Firm, including back office personnel. Discuss the Firm's succession plans.

1.4 Provide an overview of all investing, advisory or other business activities performed by the Firm. List all investment vehicles previously managed by the Firm, including predecessors to the Fund, vehicles with different investment strategies than that of the Fund and separate accounts managed by the Firm. Include information on the fee structures for each vehicle. If the Firm entered into any joint ventures with another manager, describe the structure, governance and economics of the relationship. Discuss the Firm's fundraising plans over the next 5 years.

1.5 Provide information regarding the Firm's liquidity and capitalization. If applicable, provide any debt service requirements on the Firm. Are there any personal guarantees involved? If so, by whom?

At the top of the view. There will be an option of auto select. After switching on it , on the left side there are marks of sections and questions. When hovering on any section or or subsection. It gives option for minimising or maximising icon at the center.

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When clicking for maximising on any subsection it will select that part and also allow editing it in places.



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Q 1.3 Provide an overview (including chart) of the management/organizational structure of the Firm, including back office support functions and compensation plans.

There have edit category options based right button click:

S section

Q question

D Deselect

Edit will happen on view not through any edit modal

So overall fact is that users upload pdf or docs or images. AI will analyse it. Figure out different sections and subsections or detailed explanation of subsections under each section. Section can be maximised or minimised and edited. And the hard part for me is that data(sections and subsections) will be stored in the database as well.either in if thet change it on real will

Can you do this project for me using nextjs , shadcn mongodb and gemini ai and other best free tools?