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Wilson Financial Business Rules

- Each client will have personal information (name, phone, email, address, enrollment date)
- A client can have many assets
- Assets must be stored as an INT
- A client can have many accounts
- An account can have many transactions
- Each transaction must be timestamped
- Each transaction fee must be recorded with the transaction
- Each service is priced differently
- Billing information for services must be recorded

Assumptions

- Wilson Financial offers both business and personal planning services and investment accounts.
- Wilson Financial is a small business that offers a limited number of services.
- Wilson Financial offers financial planning services that are billed at a flat or hourly rate
- Wilson financial takes a transaction fee on investments
- Scheduling calendar for financial advising appointments is separate from the client database
- Wilson financial possesses a limited number of funds (2030, 2040, and 2060 retirement fund)