

Team 39 Project Charter

Fintech and Social Networking Platform

Team Members:

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Problem Statement:

As people are getting more involved in the investment scene, aspiring investors find it challenging to find their own community to share their financial growth. While existing social media platforms allow users to share their investment experience, it currently lacks integrated financial tools, making it challenging for users to seamlessly manage social connections and financial activities. We aim to integrate both by creating a social media website where users can gain insight into their investments, share their investments among close friends, and connect with others. We're dedicated to simplifying portfolio visualization for users, providing a top-down perspective on sector distribution and percentage ownership of their investments.

Project Objectives:

- Build a website for users interested in sharing investment news with each other and connecting with others with similar interests.
- Create a personalized homepage for users and allow them to make posts.
- Enable users to connect their financial accounts for a comprehensive overview of their stock allocation.
- Implement an analytical system which sorts their holding with settings they prefer such as geolocation or sector
- Give advice on users' financial portfolio growth with insights on their portfolio, e.g. what stock made their best profit and was the most volatile
- Build a social network system to allow users to befriend one another and allow friends to see more information on personal investments.

Stakeholders:

- Users: People who want to connect with others regarding investments
- Developers: Mohana Barve, Tanay Gondil, Arjav Seshachalam, Elliot Smith, Jason Yang
- Project Manager: Ming Yan Ti
- Project Owners: Mohana Barve, Tanay Gondil, Arjav Seshachalam, Elliot Smith, Jason Yang

Deliverables:

- A React JS front end web application for users to access the website.
- A Node JS backend that will manage user data and handle the server.
- A MongoDB database to manage user profiles and storing financial data securely.
- A visual dashboard for summary of the user's portfolio, utilizing Yahoo API and others.
- A news dashboard system that pulls in current events from trusted sources.
- A friendly UI messaging interface for users to and connect better.