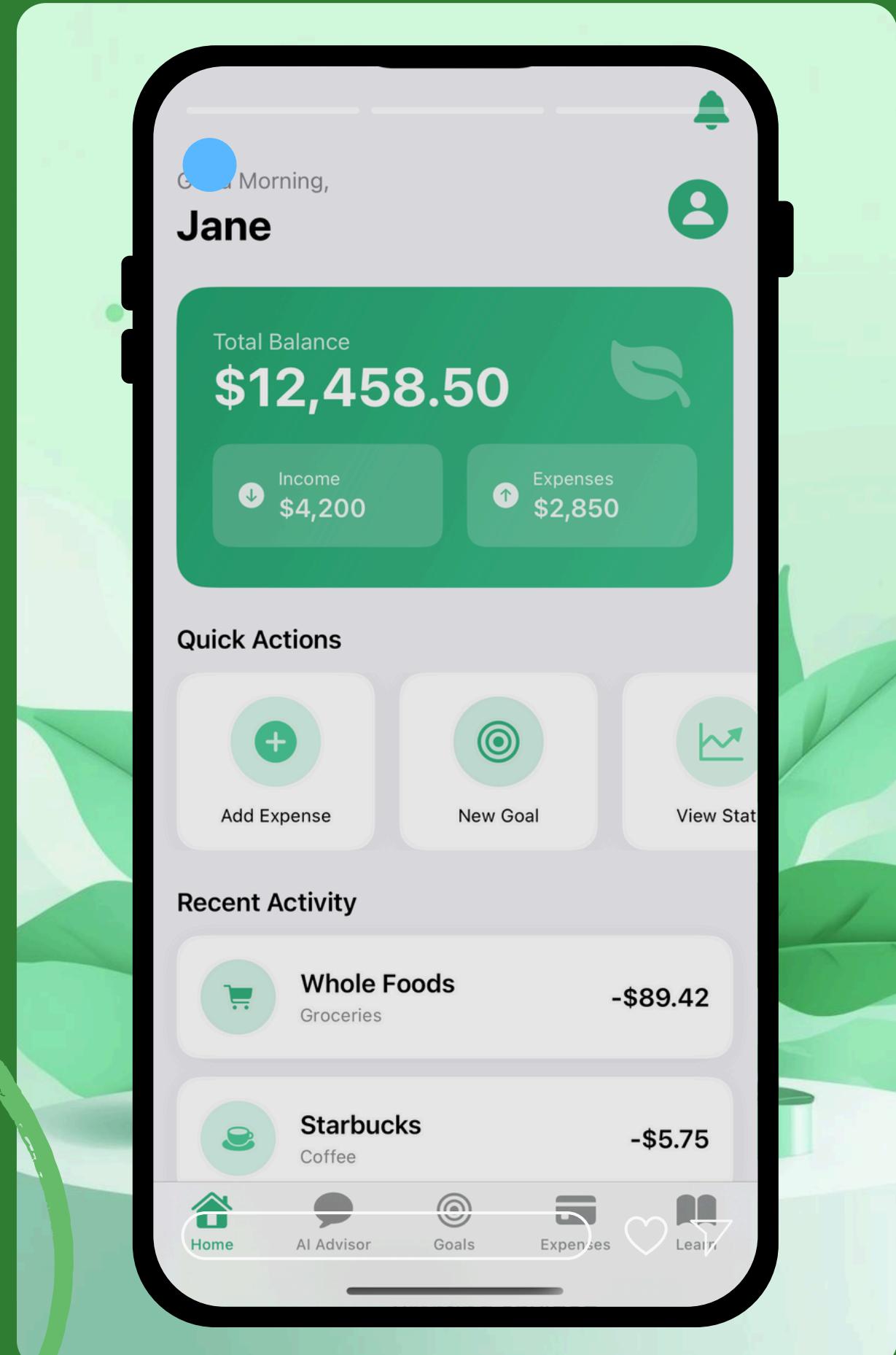


# Finance Buddy – Your Finance Companion

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AI Financial Advisor

● Online

Hello! I'm your AI financial advisor. How can I help you today?

11:50 AM

I'm trying to save for a vacation but keep overspending on dining out. Any tips?

11:52 AM

Great question! I noticed you've spent \$240 on dining this month. Let me suggest a few strategies:

1. Set a weekly dining budget of \$50

# Finance Buddy App

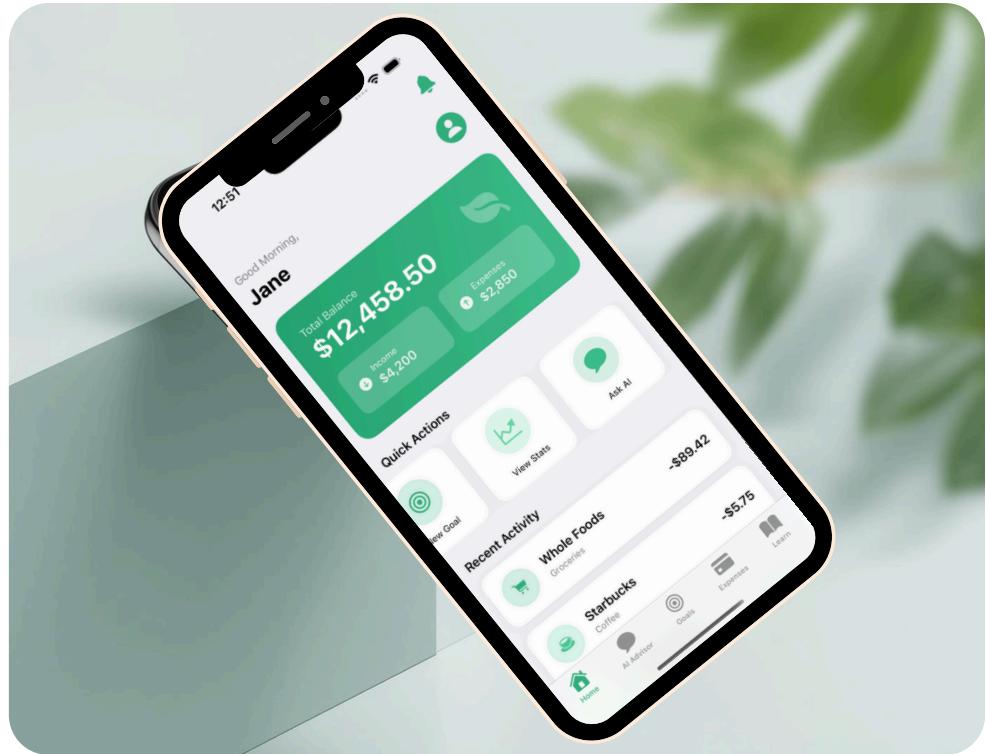
## Your Path to Financial Literacy

Finance Buddy is an iOS mobile application that helps young adults take control of their financial future through:

- **Smart Expense Tracking:** Automatically categorize and monitor spending with AI-powered insights
- **Goal-Based Savings:** Set and track financial goals with visual progress indicators
- **Personalized Learning:** Interactive financial literacy lessons tailored to your experience level
- **AI Financial Advisor:** 24/7 conversational AI assistant that understands your financial journey

# Smart Features

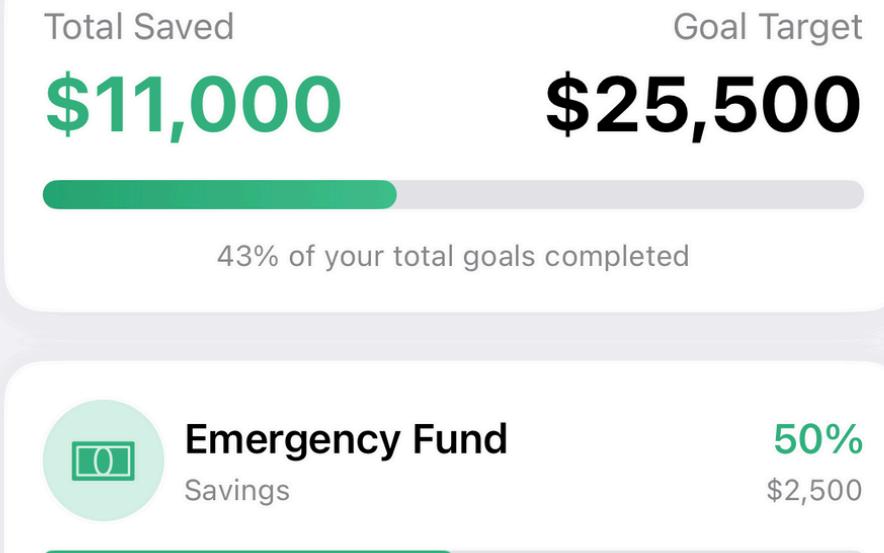
## Dashboard



The dashboard provides real-time insights into spending habits and savings progress.

## Goal Setter

### Savings Goals



Users can easily set specific savings goals and track their progress intuitively.

## AI Advisor

I'm trying to save for a vacation but keep overspending on dining out. Any tips?

11:52 AM

Great question! I noticed you've spent \$240 on dining this month. Let me suggest a few strategies:

1. Set a weekly dining budget of \$50
2. Meal prep on Sundays to

The AI Advisor offers personalized advice and tips based on user behavior and needs.

# Project Goals

## Reduce Financial Anxiety



Provide a judgment-free space where users can learn, make mistakes, and grow their financial confidence

## Build Long-term Financial Wellness



Track user growth over time, allowing the AI to adapt advice as income, goals, and life circumstances change

## Increase Literacy



Make financial education accessible and engaging for young adults who may not have learned these skills at home or school

# Project Justification

## Personal Interest



- Witnessed peers struggling with student debt, credit cards, and lack of financial planning
- Passionate about combining AI/ML with practical life skills that universities often overlook

## Team Skills



Our team's diverse skills in CS and UX ensure effective and user-friendly solutions are developed.

## Behavioral Economics

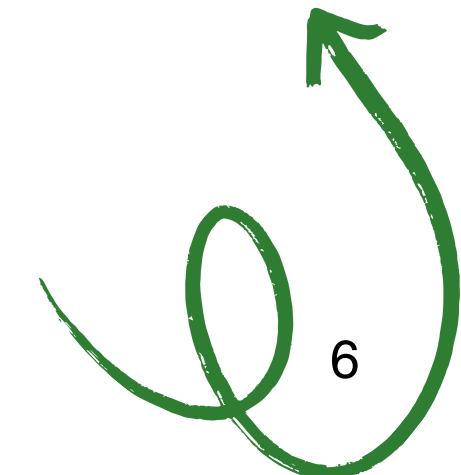
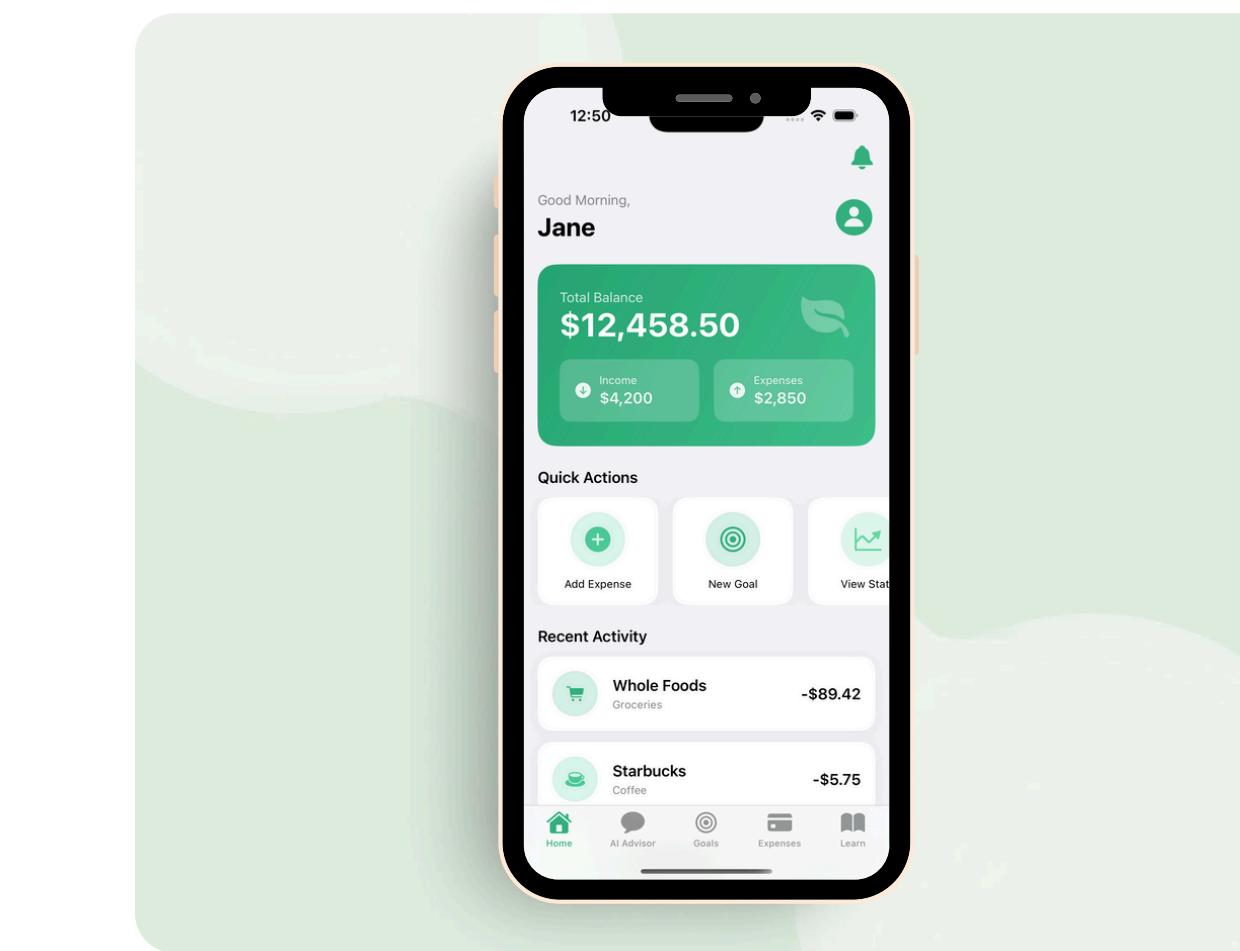


Integrating behavioral economics allows us to design features that resonate with user decision-making processes.

# User Journey with Finance Buddy

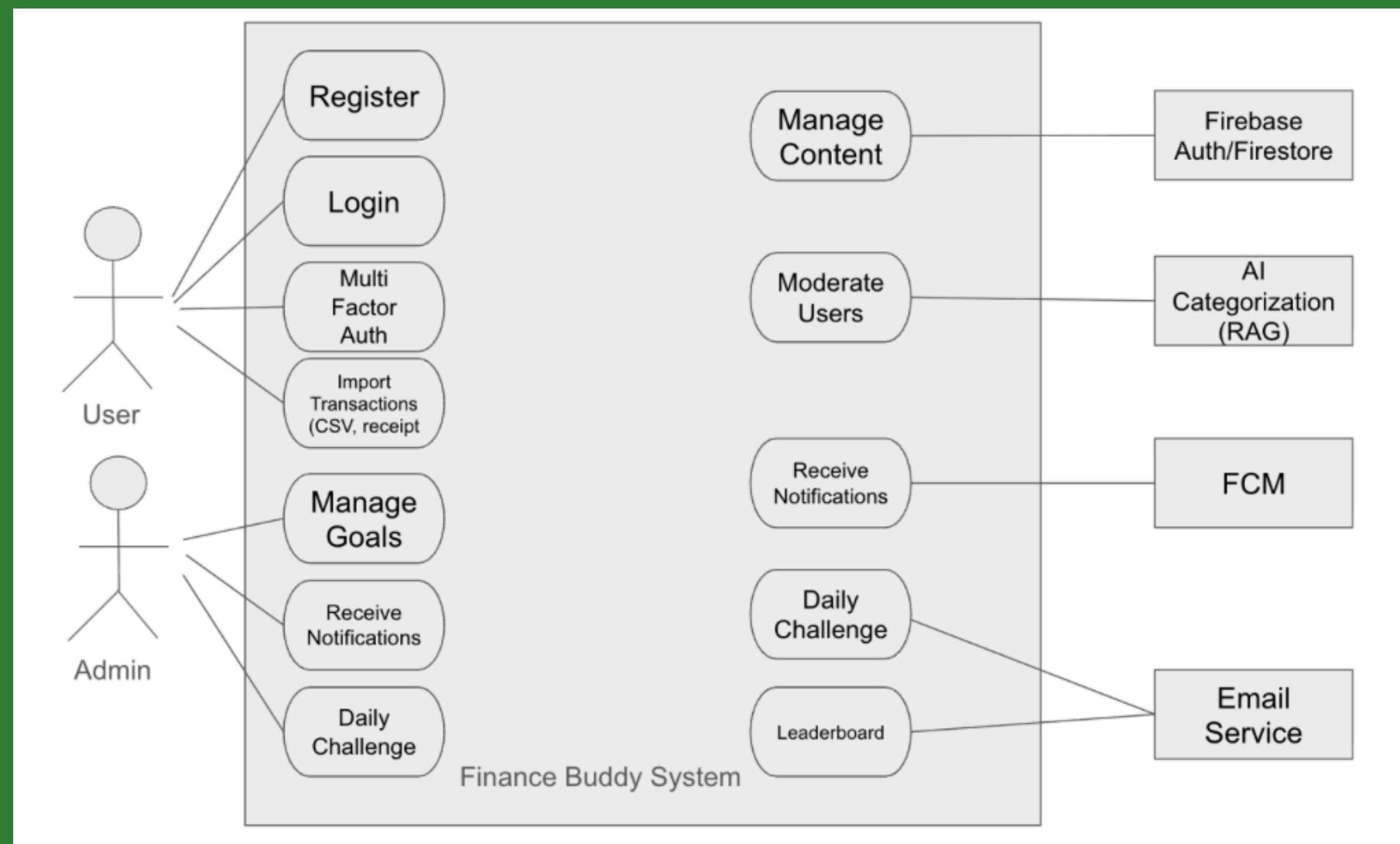
## Alex's Path to Financial Freedom

- Downloads app, completes questionnaire about income, goals, risk tolerance
- AI creates personalized financial profile
- Sets goal: "Save \$2,000 for summer study abroad"
- Tracks coffee spending, AI suggests: "You've spent \$45 on coffee this week—cutting back to 3x/week saves \$60/month toward your trip!"



# Use Case Overview

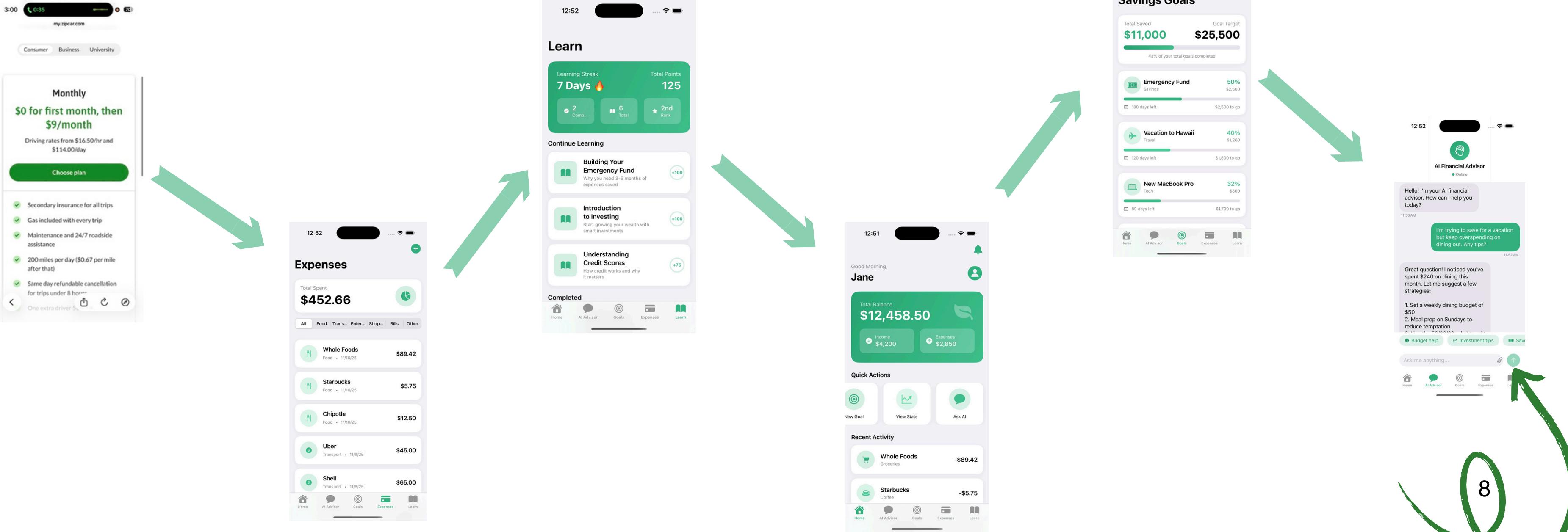
This diagram illustrates the essential interactions users will have with the Finance Buddy app, highlighting key functionalities such as logging in, adding expenses, setting goals, and completing lessons for enhanced financial literacy.



# User Interface Concepts

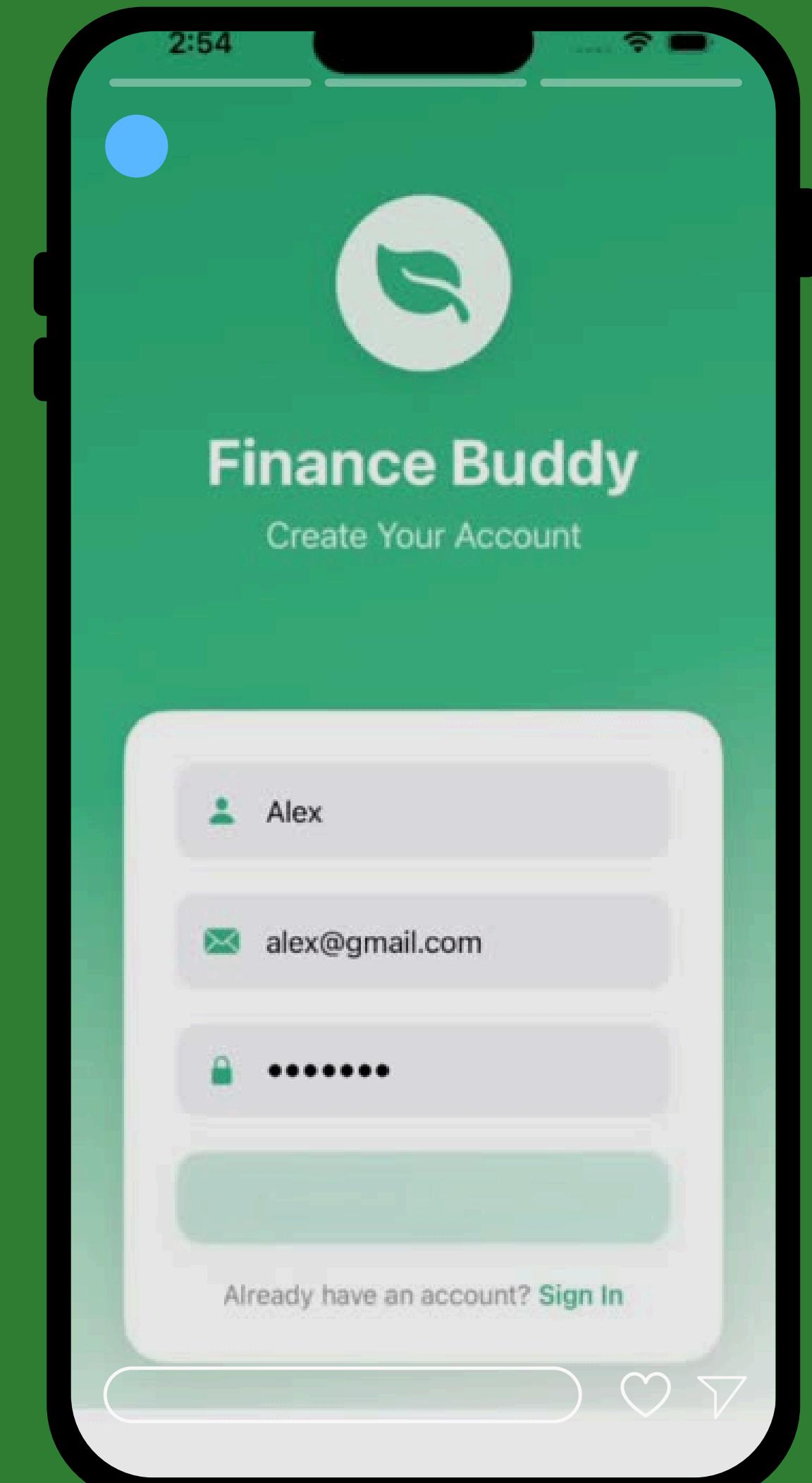
## Engaging design for financial empowerment

The Finance Buddy interface combines simplicity with functionality, featuring an intuitive dashboard, AI Assistant assistance, and gamified learning elements to enhance user engagement and financial literacy.



# Demo Time!

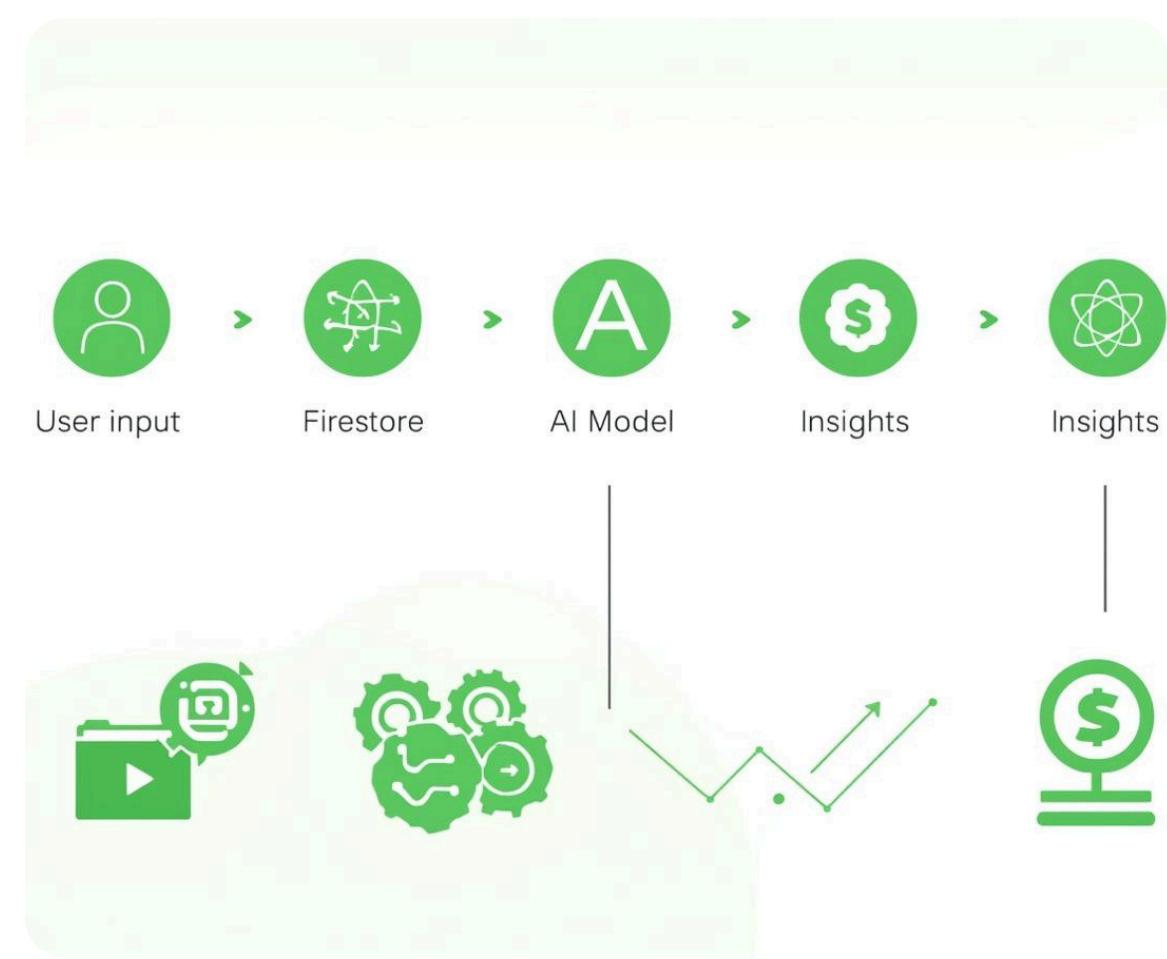
Integrating Technology for Finance Buddy



# Data Flow and Interactions

## Understanding User Engagement and Insights

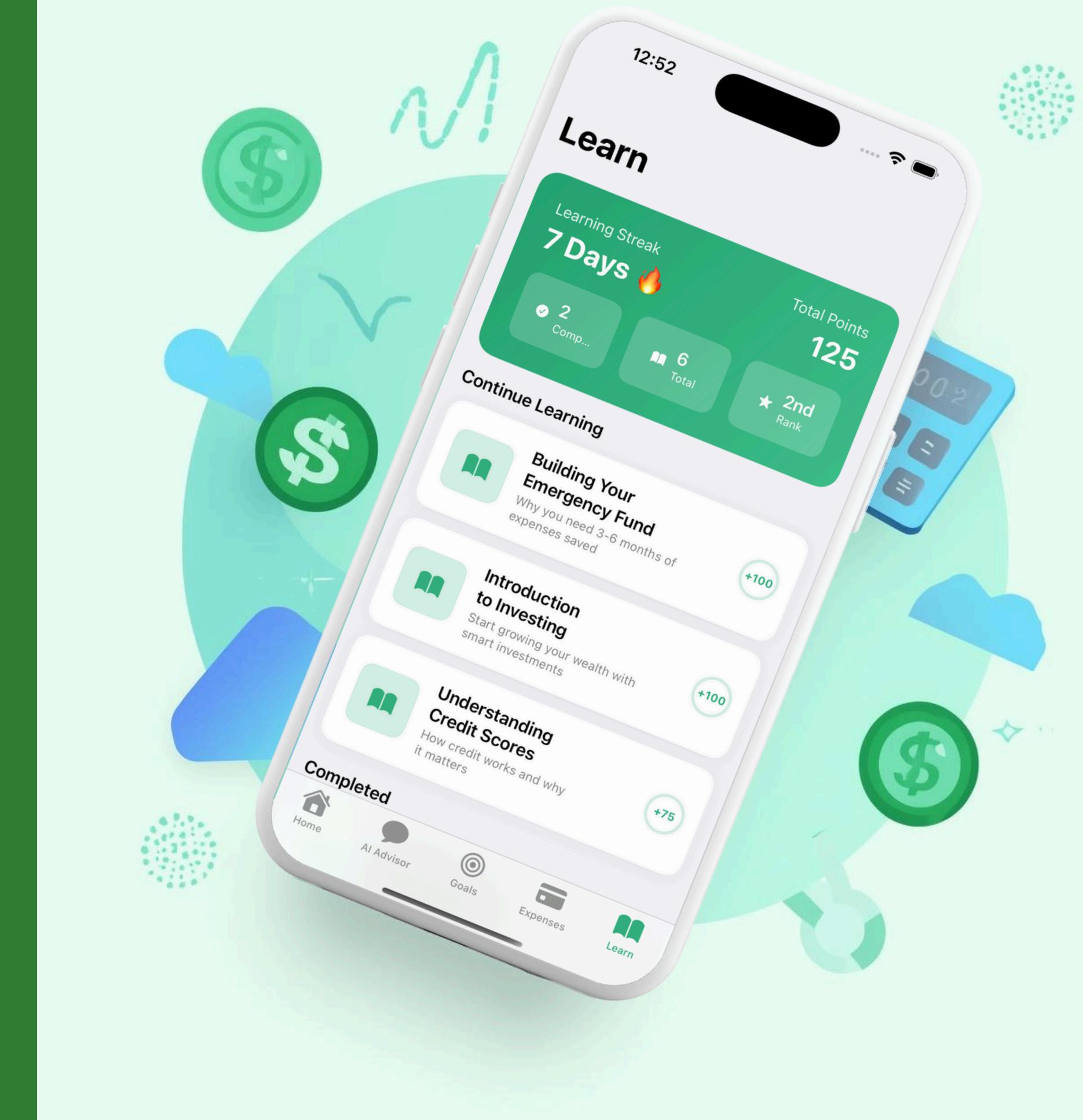
User input flows into Firestore, powering the AI model, and delivering actionable insights to enhance financial decision-making efficiently.



# Class Interactions & Data Flow

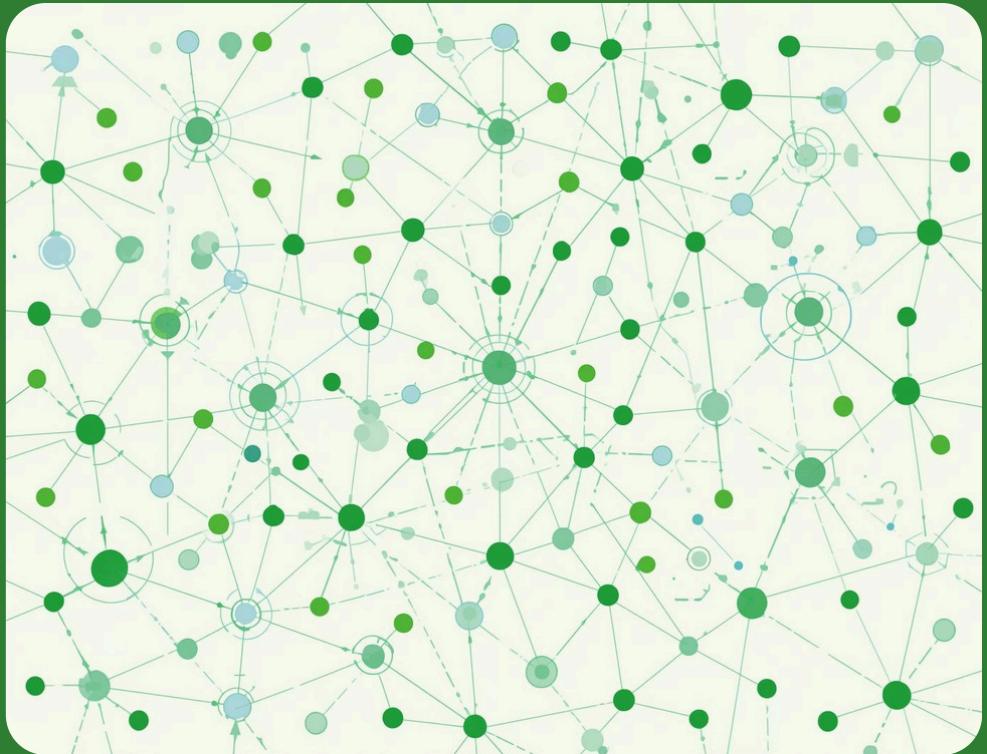
**Improved savings habits**

We project that a majority of users who interact with Finance Buddy's AI features will report enhanced savings habits, showcasing the app's effectiveness in promoting financial literacy and responsible spending.



# Project Challenges

## Firebase Integration Complexity



Problem: Managing real-time listeners, avoiding memory leaks  
Solution: Resolved real-time listener persistence with smarter lifecycle management.

## AI Chat UX



Problem: Making AI feel helpful, not judgmental about spending  
Solution: Conversational tone, celebrates wins, offers alternatives not criticism

## Data Ingestion



Problem: Integrating and cleaning user-submitted data from different sources like receipts, CSV imports, and manual inputs.

# Project Status Update: Progress and Next Steps



## Completed

SRS and Firebase setup are finalized.



## Upcoming

Next steps include testing and gamified lessons.



## In Progress

AI and goal tracking features are being developed.



## Future Goals

Focus on successful app launch and user feedback.



**Thank You!**