



Alpha Presentation

AI-Powered Financial Wellness Coach

The Capstone Experience

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*From Students...
...to Professionals*

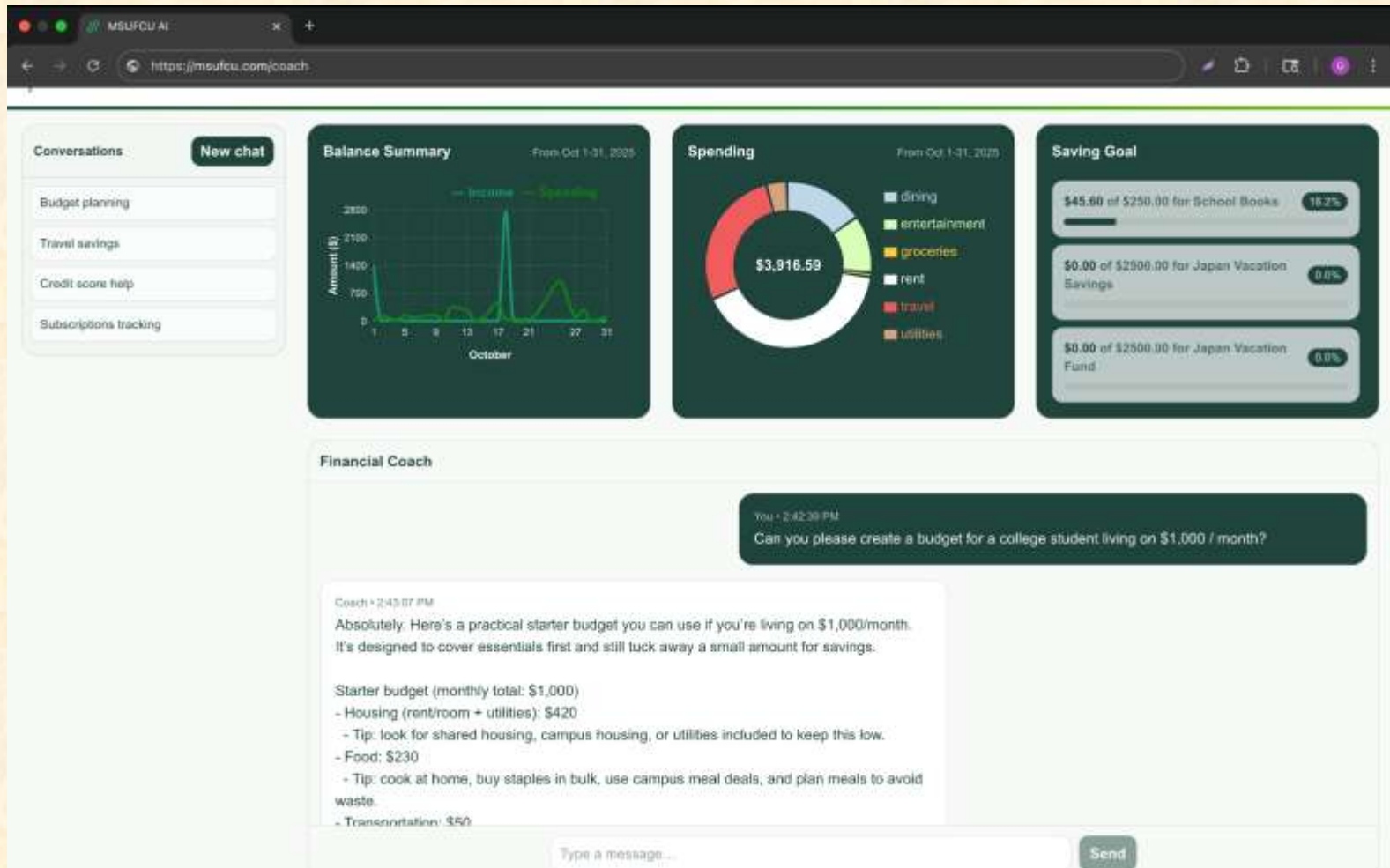
Fall 2025

Project Overview

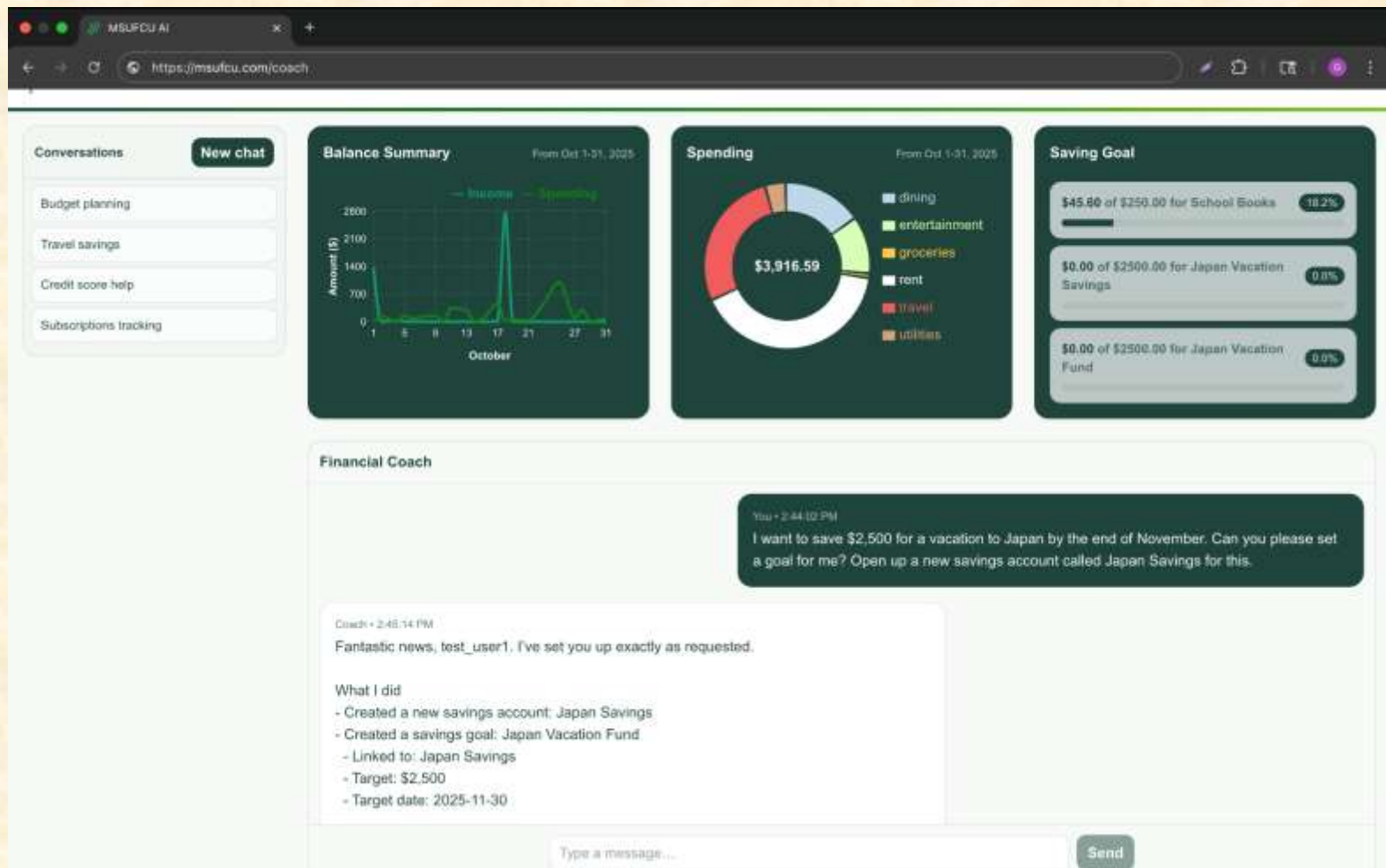
- Members need proactive, personalized guidance to improve financial wellness
- AI-powered financial coach for financial tracking
- Conversational help, spend/budget insights, goal tracking, product suggestions



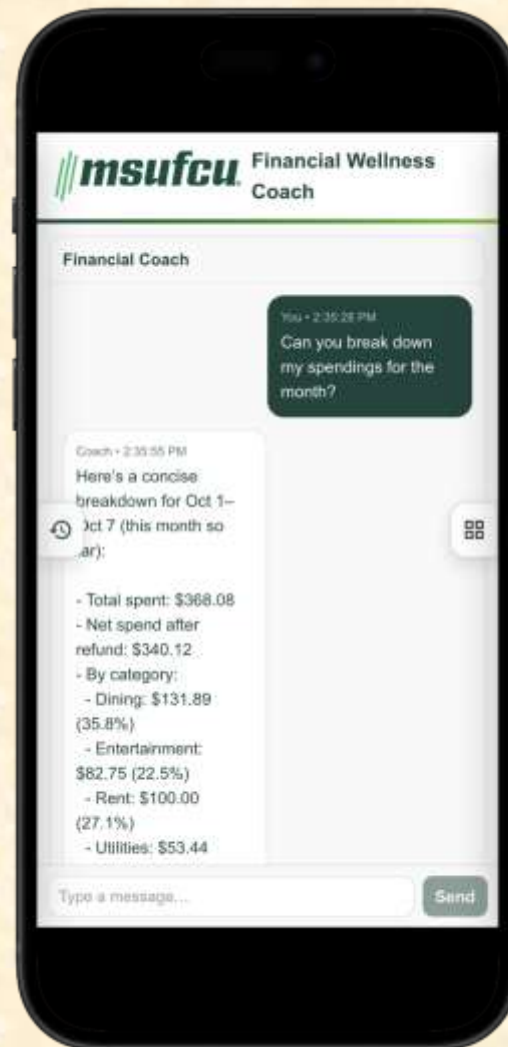
Web Page Chat and Dashboard



Goal Creation With Agent Interaction



Mobile Chat Screen



Mobile Dashboard Screen



What's left to do?

- **Proactive Alerts:** Notify members on remaining budgets and progress for goals
- **Product Recommendations:** Suggest rewards and cards for members based on credit scores.
- **UI/UX Enhancements:** Refine dashboard layout and accessibility
- **MCP Tools:** Building and refining tools
- **Budget Tracking:** Create/Track a budget in the database through chatting with agent



Questions?

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