



Beta Presentation

AI-Powered Financial Wellness Coach

The Capstone Experience

Team MSUFCU

Alexander Goluska

Anuj Jadhav

Bruno Budelmann

Grant Perlmutter

Rion Ando

Ronith Arum

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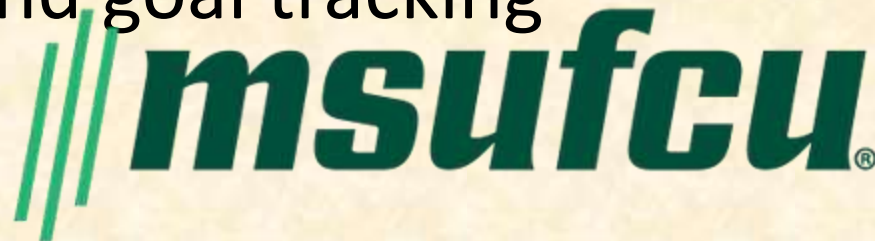


*From Students...
...to Professionals*

Fall 2025

Project Overview

- Members lack proactive, personalized guidance to improve financial wellness that is easy to use
- AI-powered financial coach for financial tracking
- Conversational help, spending and budget insights, and goal tracking



Team Member's Technical Tasks

Technical Tasks Assigned

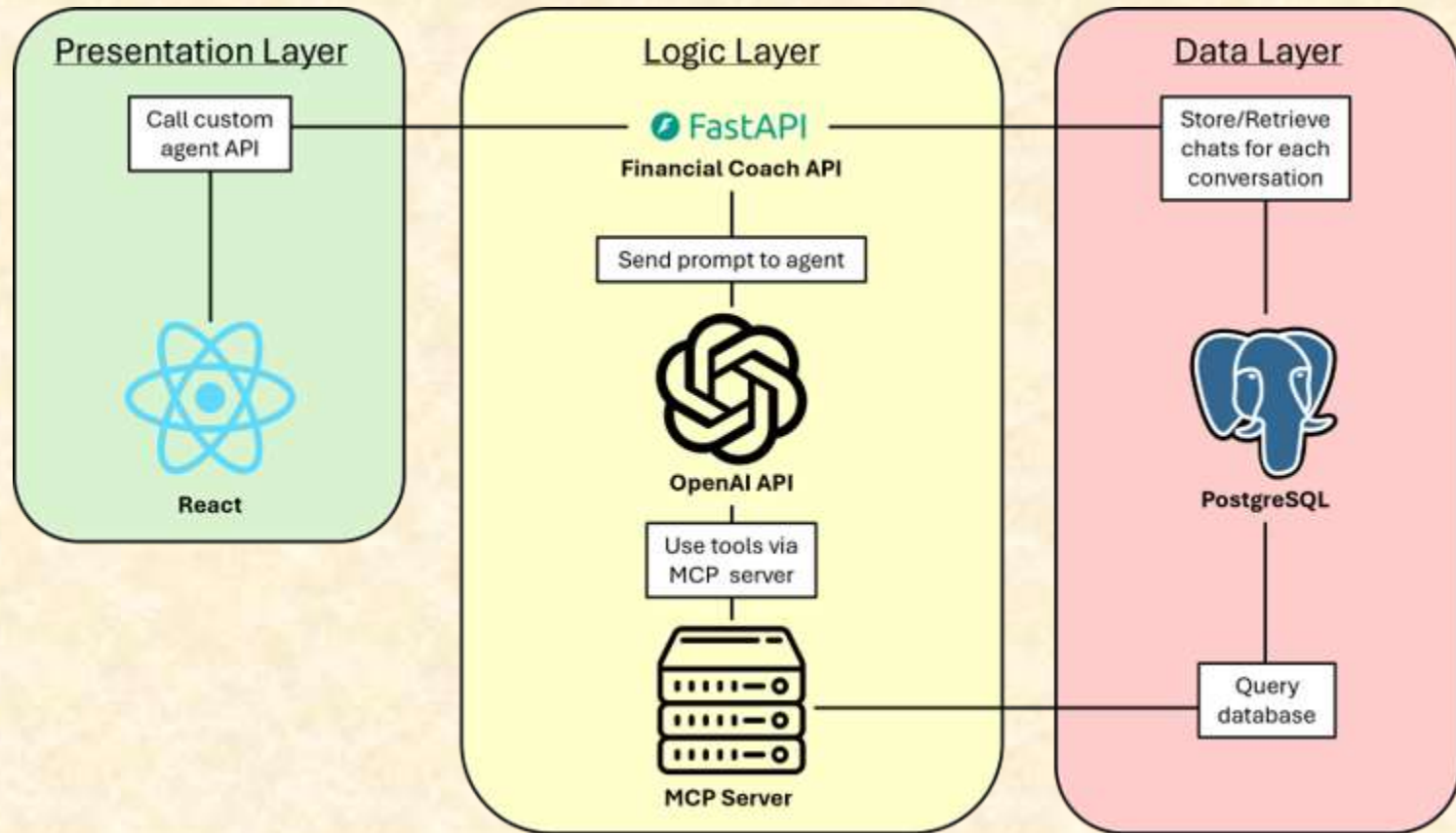
- Rion Ando
 - Connect LLM agent to front end.
 - Create a conversational panel for chat
 - Link member id and user login credentials for unique data display
- Ronith Arum
 - Initialize and build out MCP server and tools for agent to use
 - Develop an interactive savings goal tracker on front and back end
 - Create API functions for financial data to display on front end
- Bruno Budelmann
 - Create initial UI for chat and dashboard
 - Add savings goal functionality through dashboard
 - Notification feature front and back end
- Alexander Goluska
 - Back-end LLM agent functionality and usage
 - Connections between API, MCP server, and front-end
 - Financial 4.0 and server-side authorization verification
- Anuj Jadhav
 - Authentication (Login/Sign-up)
 - Database schema design and mock data generation
 - Mobile UI Compatibility
- Grant Perlmutter
 - Create API endpoints to allow users to chat with agent
 - Track savings goal progress and inform users at 25% milestones
 - Develop tools to help users set and monitor monthly budgets

Technical Tasks Completed

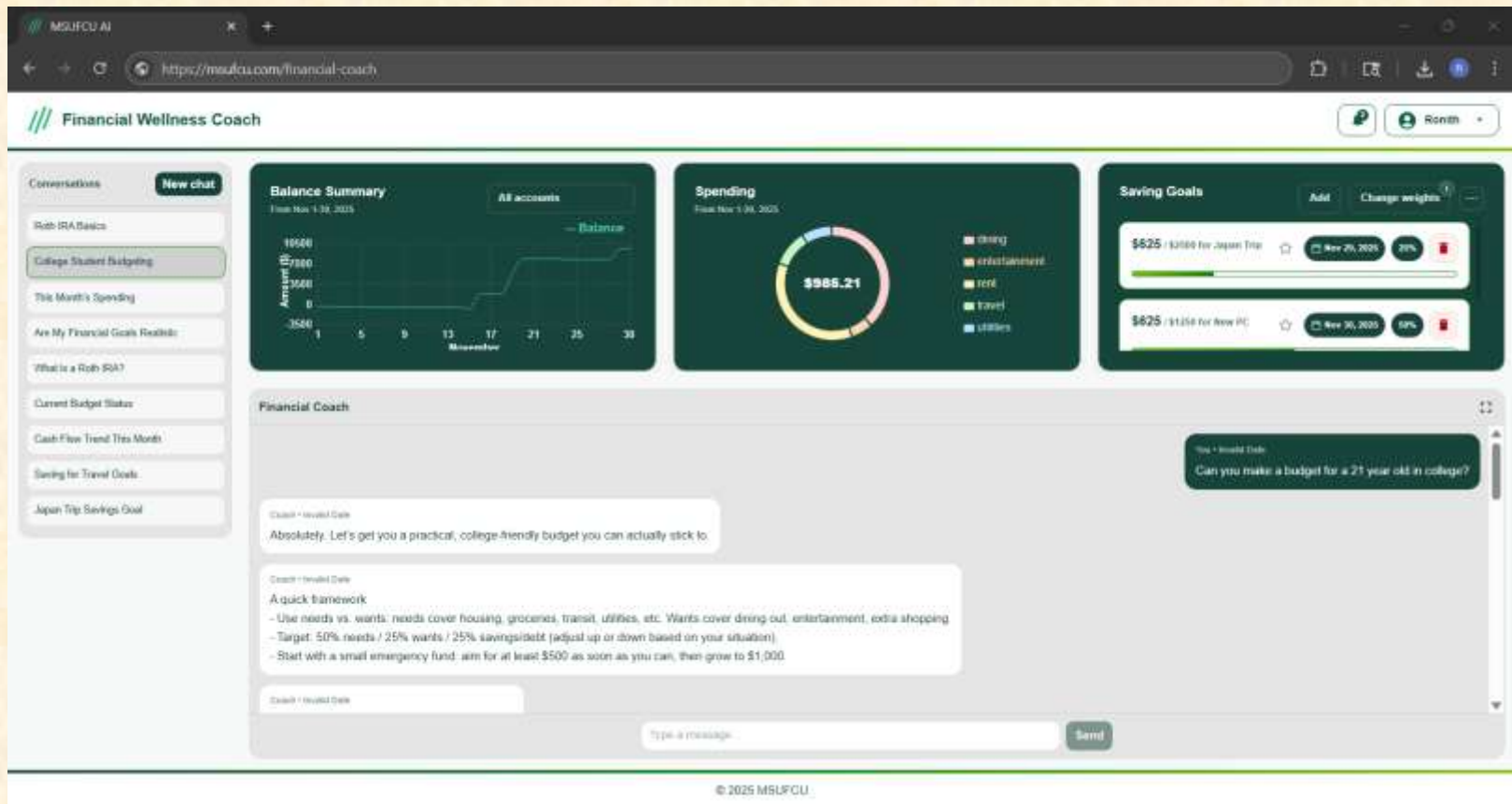
- Rion Ando
 - User can interact with agent through a chat window
 - Users can interact with different data stored conversations
 - Every authenticated user displays their own financial data
- Ronith Arum
 - LLM agent can interact with tools that pulls financial data
 - Users have a dashboard panel to track & manage savings goals
 - Visualize financial information for users to observe and identify
- Bruno Budelmann
 - Web app design fully feature complete
 - User can Add a savings goal through dropdown menu
 - User can interact with notifications that route to agent chats
- Alexander Goluska
 - LLM agent connects to OpenAI and can give or stream responses
 - API connects to MCP server, and all can be hosted to same URL
 - Connects to Financial 4.0 and JWTs for internal authorization
- Anuj Jadhav
 - New Sign-up/Login user flow
 - Mock data generation and database design
 - App front-end compatibility of mobile devices
- Grant Perlmutter
 - Users can create new chats and continue old chats with agent
 - Agent informs users when they reach savings goal milestones
 - Users can interact with agent to create and monitor budgets



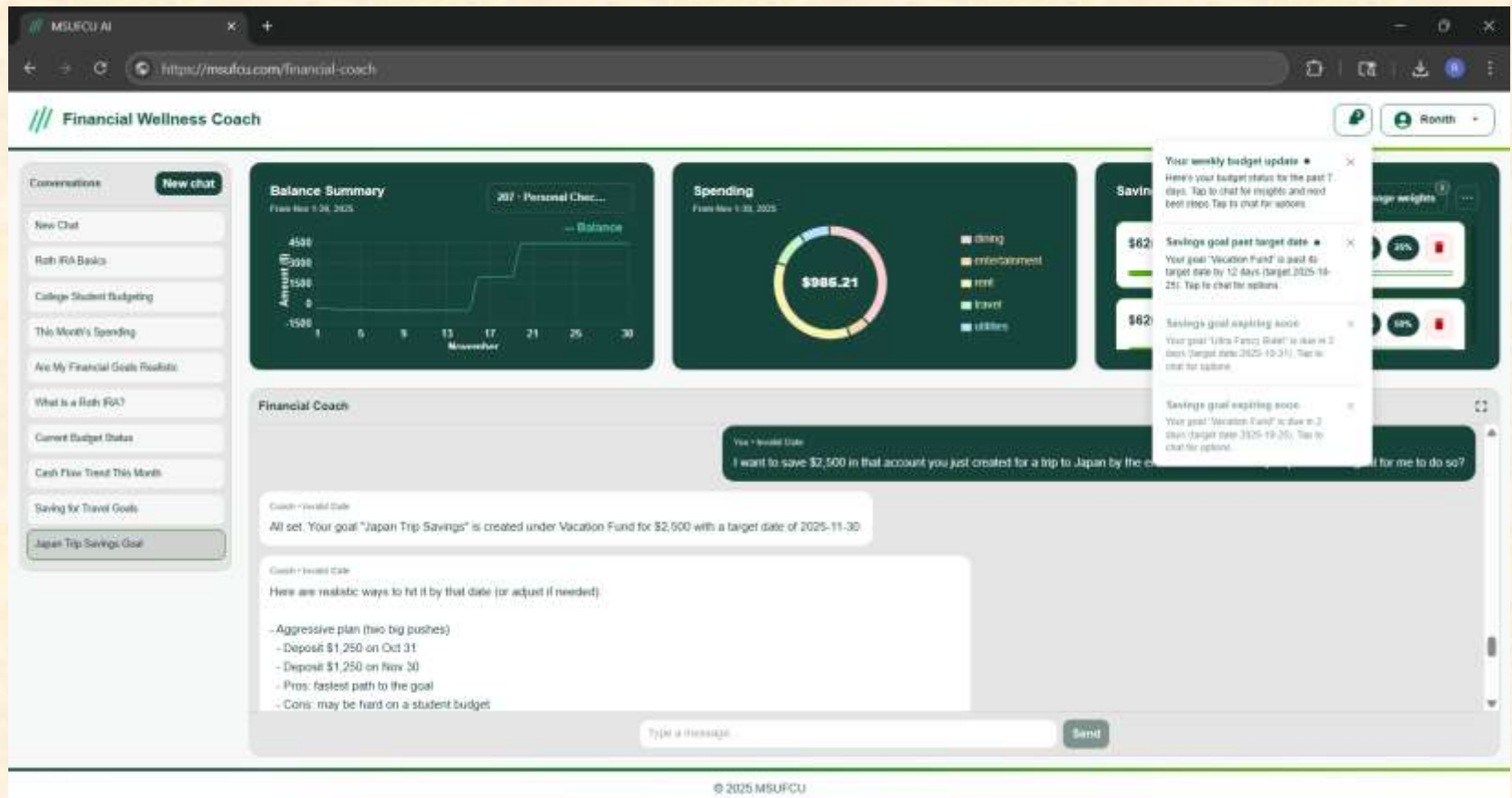
System Architecture



Web Page Chat and Dashboard



Goal Creation Chat & Notifications



Mobile Chat Screen With Prompts



Mobile Dashboard Screen



What's left to do?

- Features
 - N/A
- Stretch Goals
 - Summarize Financial 4.0 information for responses
 - Manual method to edit savings goals
- Other Tasks
 - Mobile view sizing bugs
 - Remove brief display of suggested prompts when switching chats
 - Auto scroll to top of chat for new messages
 - General bug-fixes



Questions?

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