Digital Financial Advisor Platform

Background

In today's world, many people—students, working professionals, and small business owners—struggle with **managing income, expenses, savings, and investments**. Hiring professional financial advisors is expensive and not easily available in all areas.

This leads to:

- Overspending without proper tracking.
- Poor savings habits.
- Lack of awareness about safe investment opportunities.
- Limited access to expert financial guidance.

A **digital platform** can solve this problem by providing a **bridge between clients and advisors**.

The Challenge

Build a **web-based financial advisory platform** where:

1. **Clients**
   a. Can create profiles
   b. Search and connect with certified financial advisors.
   c. Book appointments.

2. **Advisors**
   a. Can create professional profiles showing their **specialization, experience, and fees**.
   b. Receive appointment requests from clients.
   c. Provide advice through **chat or video call**.
   d. Share personalized recommendations with clients.

3. **Platform Features**
   a. Secure login for both clients and advisors.
   b. Communication system (chat, optional video calls).
   c. Appointment booking and scheduling.
   d. Payment integration (per session or subscription).
   e. Financial literacy section with simple articles and resources.

Goal

To create a **secure, user-friendly, and affordable financial advisory platform** that:

- Helps clients manage money wisely.
- Connects clients with certified advisors easily.
- Improves financial literacy and promotes savings culture.

Project Evaluation Criteria (Out of 10 Marks)

Criteria	Description	Marks (Out of 10)
1. Problem Understanding	How clearly the team explains the problem statement, its importance, and the need for the solution.	**2 /**
2. Innovation & Idea	Creativity of the solution. Is it just common or does it bring something new (AI, unique features, better accessibility)?	**2/**
3. Technical Implementation	How well the web platform is built – frontend, backend, database, security, and functionality.	**2/**
4. User Experience (UI/UX)	Simplicity, design, and ease of use. Is the platform user-friendly for both clients and advisors?	**2/**
5. Presentation & Communication	How well the team presents/explains their project (clarity, time management, answering questions).	**2/**