



## What is WealthWise?

- **WealthWise** is a mobile finance app that helps users save money, reduce debt, and reach financial goals through personalized budget plans.
- By analyzing uploaded **PDF bank statements**, WealthWise identifies spending patterns, categorizes expenses, and creates tailored saving strategies based on user-defined goals and timelines.

## Problem Statement

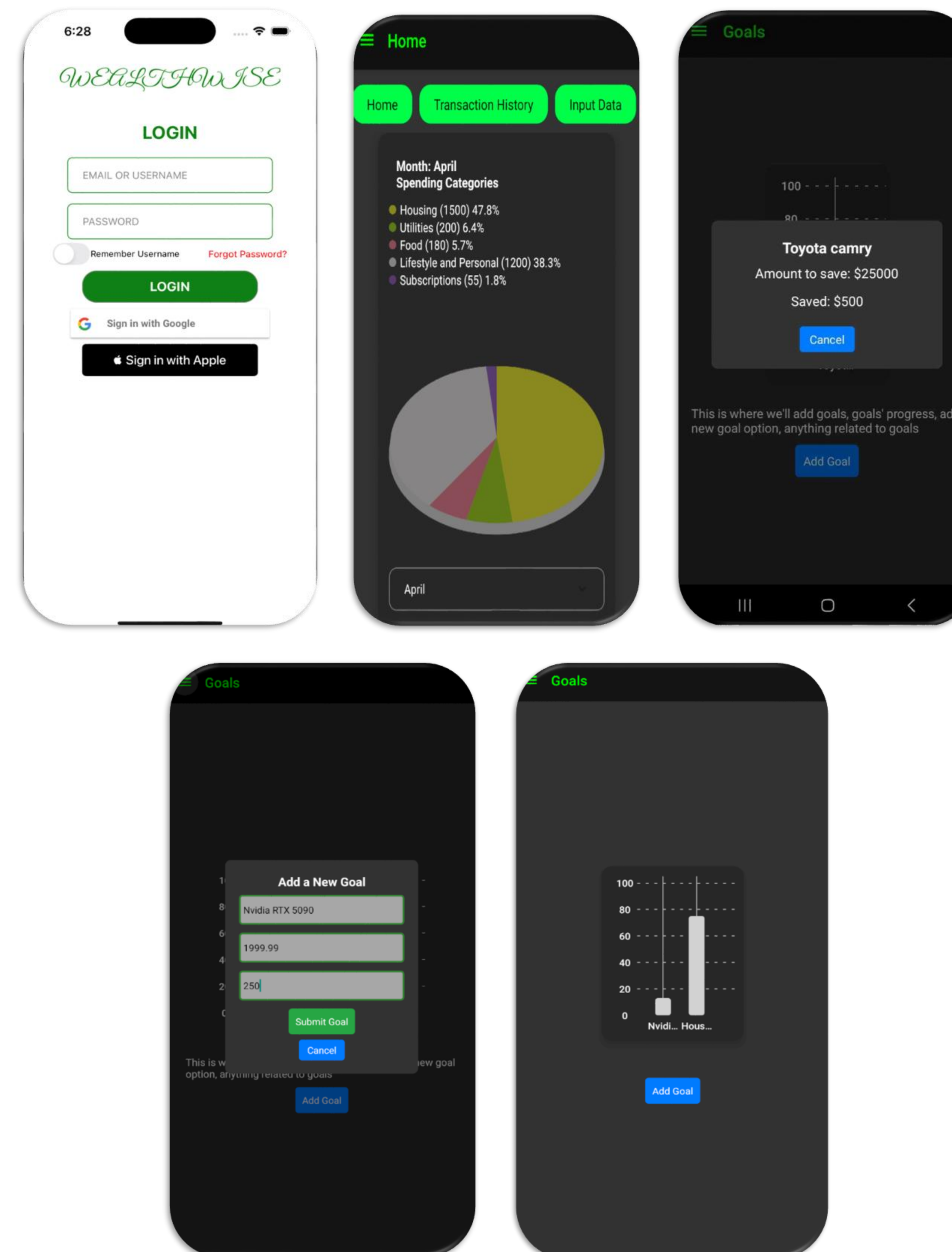
- Managing personal finances can be overwhelming, especially for individuals who lack time, tools, or financial expertise. Many people struggle to track their spending, save effectively, or identify unnecessary expenses.
- Most budgeting apps require users to link their bank accounts and hand over sensitive financial information. A user who is uncomfortable with that is left with two poor choices: give up privacy or give up financial clarity.

## Proposed Solution

WealthWise addresses these issues by providing a user-friendly app that:

- Categorizes expenses (e.g., groceries, fast food, rent) to highlight unnecessary spending.
- Parses **PDF versions of bank statements** instead of requiring sensitive banking logins.
- Allows users to set and track savings goals with personalized timelines.

## UI Design



- Cross-platform app using **React Native** (iOS & Android)
- **User-friendly interface** with intuitive navigation
- **Light & Dark Mode** toggle
- Categorized expense pie chart: groceries, rent, leisure, etc.
- Integrates Google Login button into the interface
- Handles OAuth redirection to Google's login page

## Backend & Database

- **Secure user authentication** with backend password hashing
- Data parsing logic to extract and categorize **transactions from PDFs**
- HTTPS-secured communication between frontend and backend
- Storage of previous statements for progress comparison
- Income and spending saved in database to track progress made in spending areas
- Keeps monthly statement information to display month to month progress on maintaining budget

## Development Tools



## Website & Contact

- Learn more about WealthWise by scanning the QR code to the right!
- You can also reach us at [wealthwise@cs.csub.edu](mailto:wealthwise@cs.csub.edu)

