

STCS PROJECT PROFILE

Financial Advice Bureau Certitude Pass Book System

STCS

FINANCIAL ADVICE BUREAU

The Financial Advice Bureau is a firm of independent financial advisors, located in Middlesbrough, North East England. It is a Financial Services organisation specialising in the full range of Pensions, Investments and Savings financial advice.

PROJECT REQUIREMENT AND SCOPE

For certain types of investment, The Financial Advice Bureau wanted to create a system in which their customers could keep a passbook, similar to a traditional bank savings book, showing the investments and withdrawals, as well as the monthly valuations. The idea was that a computer system would maintain the investment record and whenever a customer returned a passbook for updating, the system would update the passbook, and then it would be returned to the customer.

TECHNICAL APPROACH

The requirements for the system were investigated and the specification consisting of screen designs, a database design and a narrative description of the processing was created and agreed by the client. The graphic design of the passbook was done in parallel with the design of the print module for the computer system to ensure that the fonts, and line spacing were compatible with the passbook blanks. The system was built between January and June 2008, and was passed through user acceptance testing at the end of August 2008.

KEY TECHNOLOGIES USED

The system was built using C# and a MySQL database.