



# Dynamic Dashboard

A dynamic, personalized dashboard that lets Vanguard customers access information, ask questions, and get answers, all in one place without leaving the main website.

**Authors:** Florence Han, Francis Nguyen, Nikolas Slivinski, Vivian Tran, Will Warden, Yuxin Chen

**Stakeholders:** Ben Stephan, Jyoti Manjot Kaur

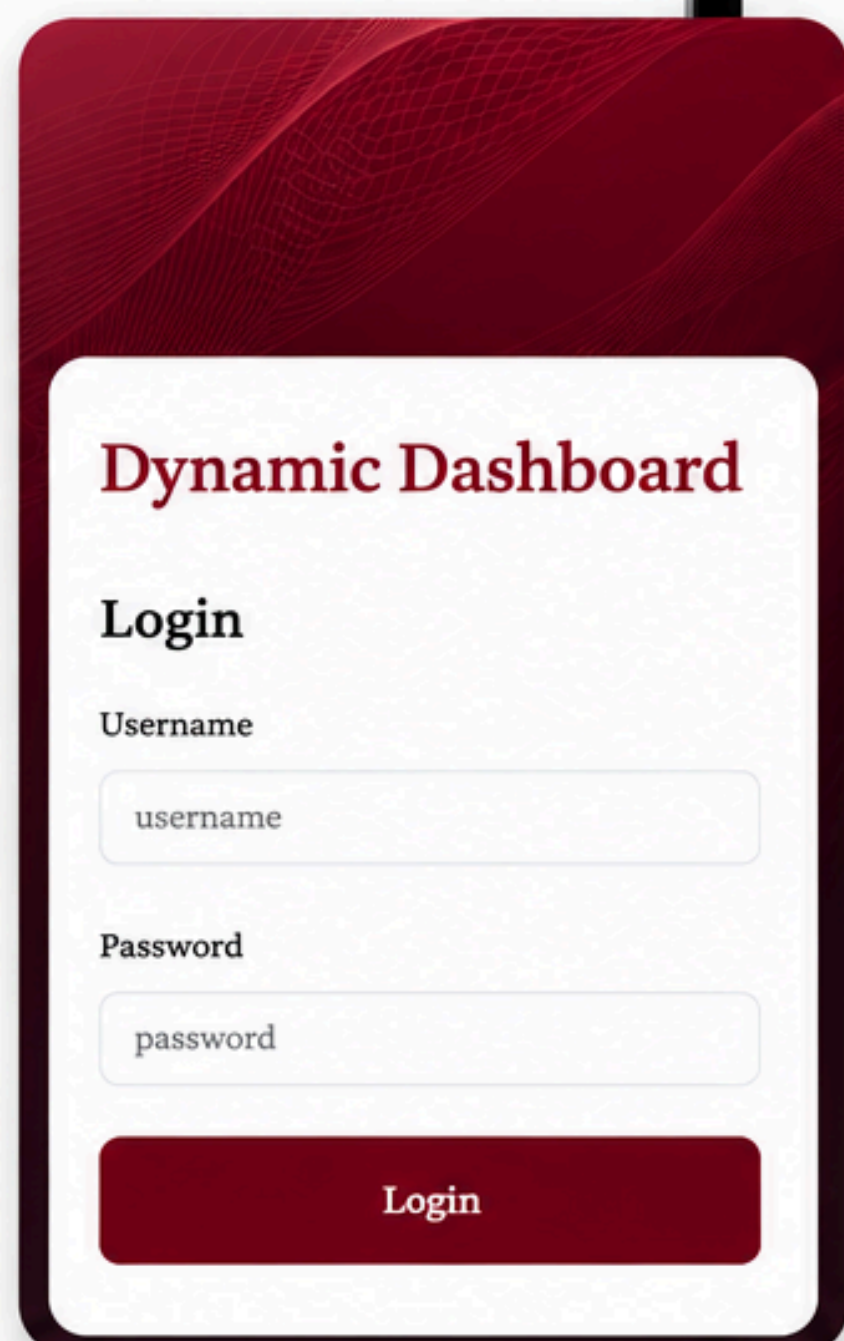
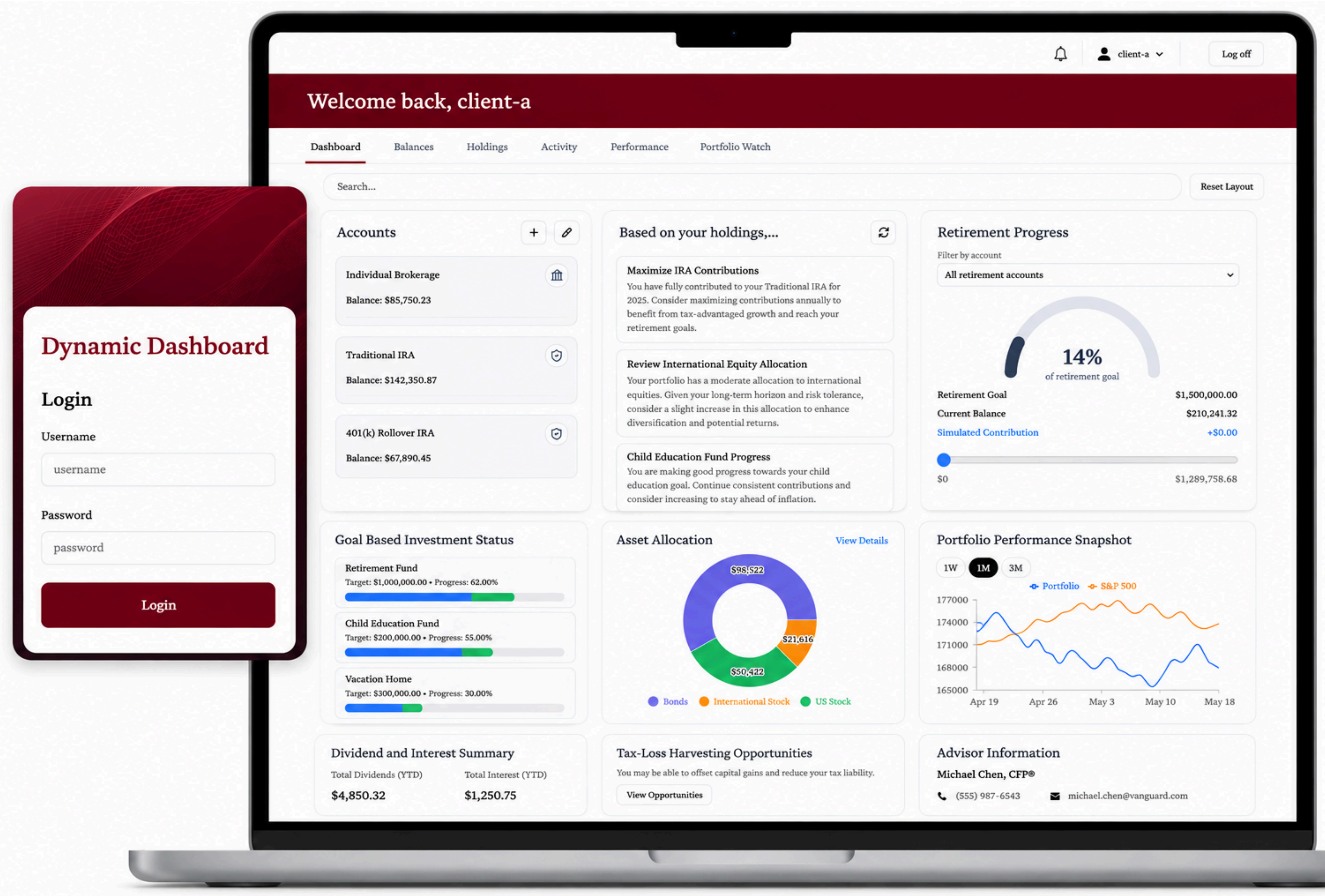
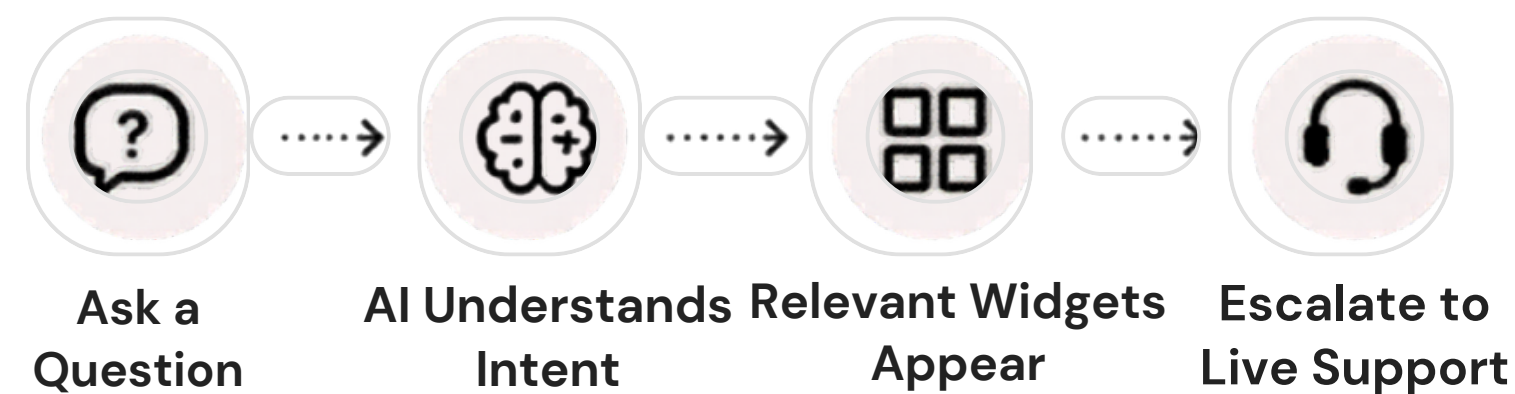
## PROBLEM STATEMENT

Currently, when Vanguard clients need help or have questions, they cannot **get support directly within the website experience** and are instead redirected to an 800 number or separate support system.

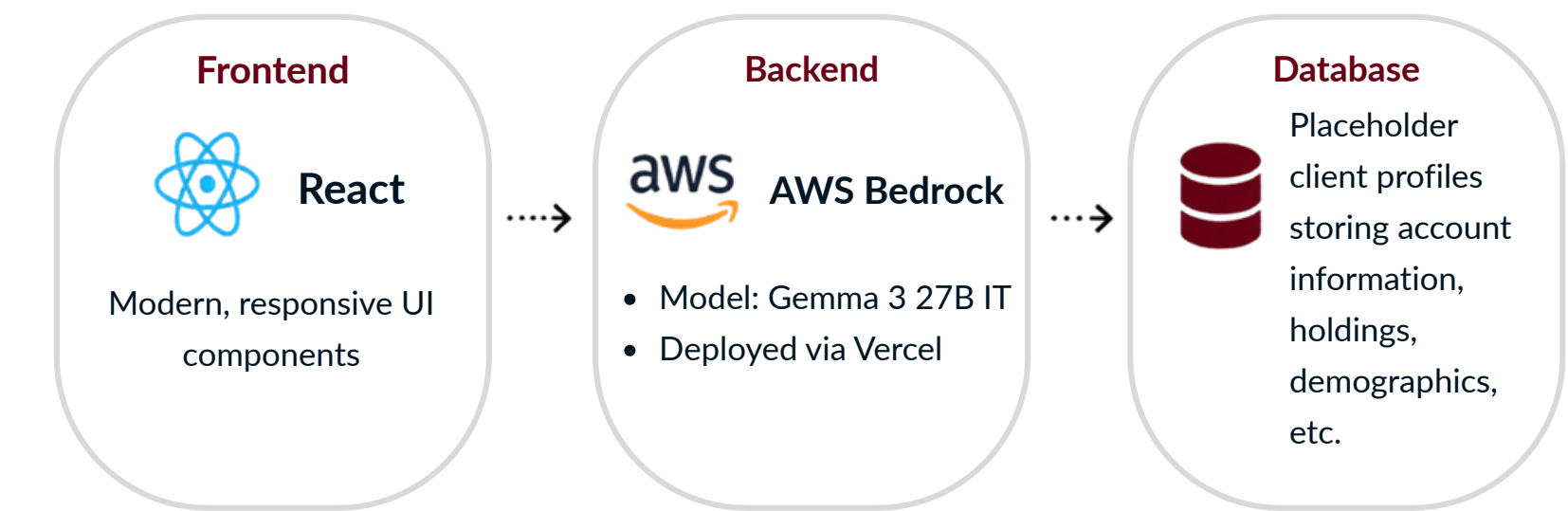
This interruption can **reduce engagement** and make the support process less seamless and convenient for users.

## SOLUTION

Our approach integrates a conversational AI experience directly into the dashboard search bar. When a user asks a question, the LLM provides a response and surfaces relevant dashboard widgets based on the user's intent. If additional help is needed, the system can escalate the user to live support within the same interface.



## ARCHITECTURE

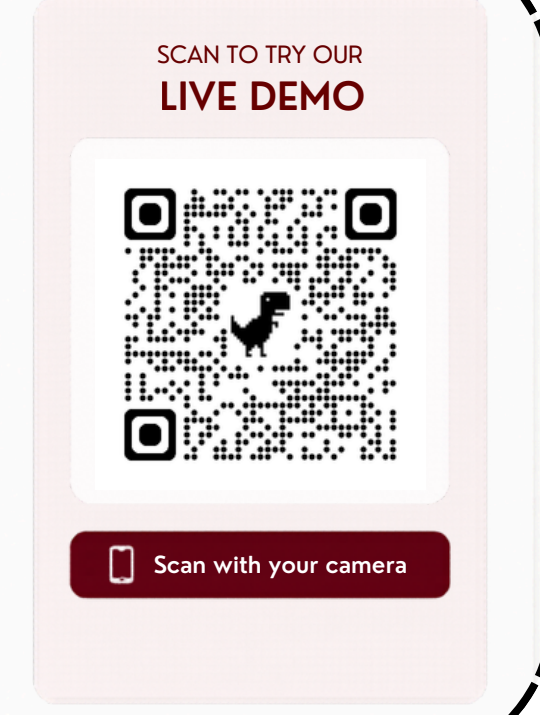


## Demo Credentials

Username: client-a  
Password: password123

Username: client-b  
Password: password456

Username: client-c  
Password: password789



## KEY FEATURES

**AI-Powered Personalized Dashboard:**  
Dynamically rearranged widgets based on client profiles and investment goals using AWS Bedrock

**Natural Language Search:**  
Lets users ask financial questions and receive AI-generated answers with relevant recommendations

**Interactive Financial Widgets:**  
Includes portfolio tracking, asset allocation, retirement progress, watchlists, and investment goal monitoring

**Personalized Recommendations:**  
Generates tailored financial insights based on user activity, holdings, and risk tolerance