

Content

Introduction	7
Chapter 1	
Planning as an element of personal finance.....	11
1.1. The essence and tools of financial planning.....	11
1.2. The objectives of financial planning and evolution in personal finance....	14
Chapter 2	
The essence and instruments of financial advice	23
2.1. The concept of consulting and financial advice	23
2.2. The role of a financial adviser in various phases of financial planning....	27
Chapter 3	
Artificial intelligence and FinTech in financial planning	43
3.1. Artificial intelligence and its application in finance	43
3.2. FinTech – essence and classification	52
3.3. FinTech as an example of artificial intelligence in personal finance	57
3.4. PFM and its use in financial planning.....	64
3.5. Robo-advice and its application in financial planning and advice.....	67
Chapter 4	
PFM applications as an example of artificial intelligence	71
4.1. PFM applications in the light of secondary research	71
4.2. PFM applications in the light of initial research	76

Chapter 5

Robo advice in planning and financial advice	91
5.1. Robo advice in the light of secondary research	91
5.2. Robo advice in the light of primary research	96
Summary	109
References.....	113
List of tables	121
List of figures.....	123
About authors	125

Cover design: Agnieszka Natalia Bury

CEDEWU Sp. z o.o.

Artificial intelligence and robo-advice in financial planning

1.1. Artificial intelligence and its application in finance

1.2. FinTech – essence and classification

1.3. FinTech as an example of artificial intelligence in personal finance

1.4. PFM and its use in financial planning

1.5. Robo-advice and its application in financial planning and advice

Publication number: (ISSN) 2657-1835

Artificial intelligence and robo-advice in financial planning

1.1. PFM applications as an example of artificial intelligence

1.2. PFM applications in the light of secondary research

1.3. PFM applications in the light of initial research

Economic Bookstore

00-680 Warszawa, ul. 47 Żurawia Street

Tel.: (+48 22) 396 15 00

On-line Economic Bookstore

cedewu.pl