

# FinPersona: An LLM-Driven Conversational Agent for Personalized Financial Advising

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Paper



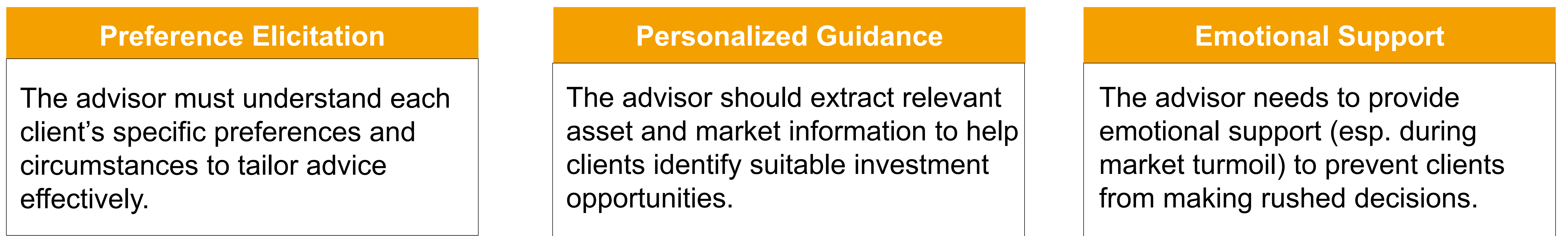
Demo

## Personalized Financial Advisor (PFA)

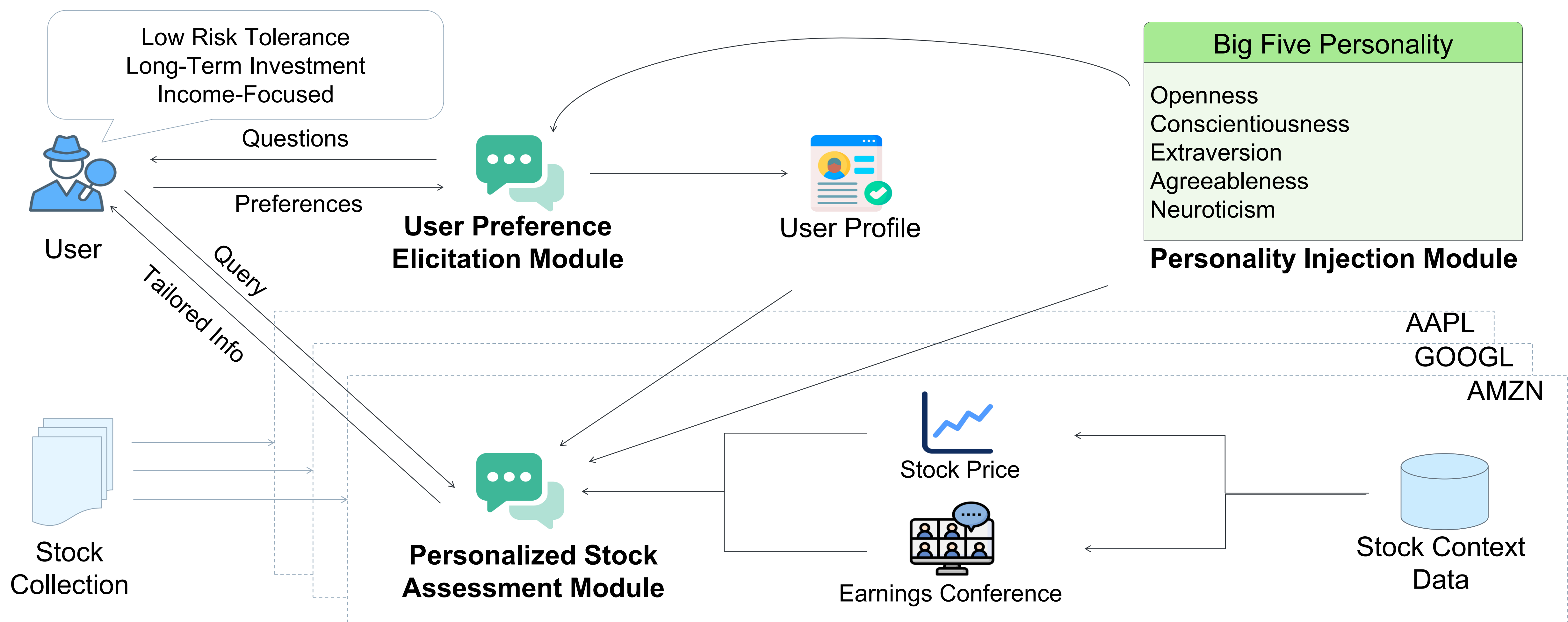
PFA can offer personalized guidance and provide emotional support for retail investors



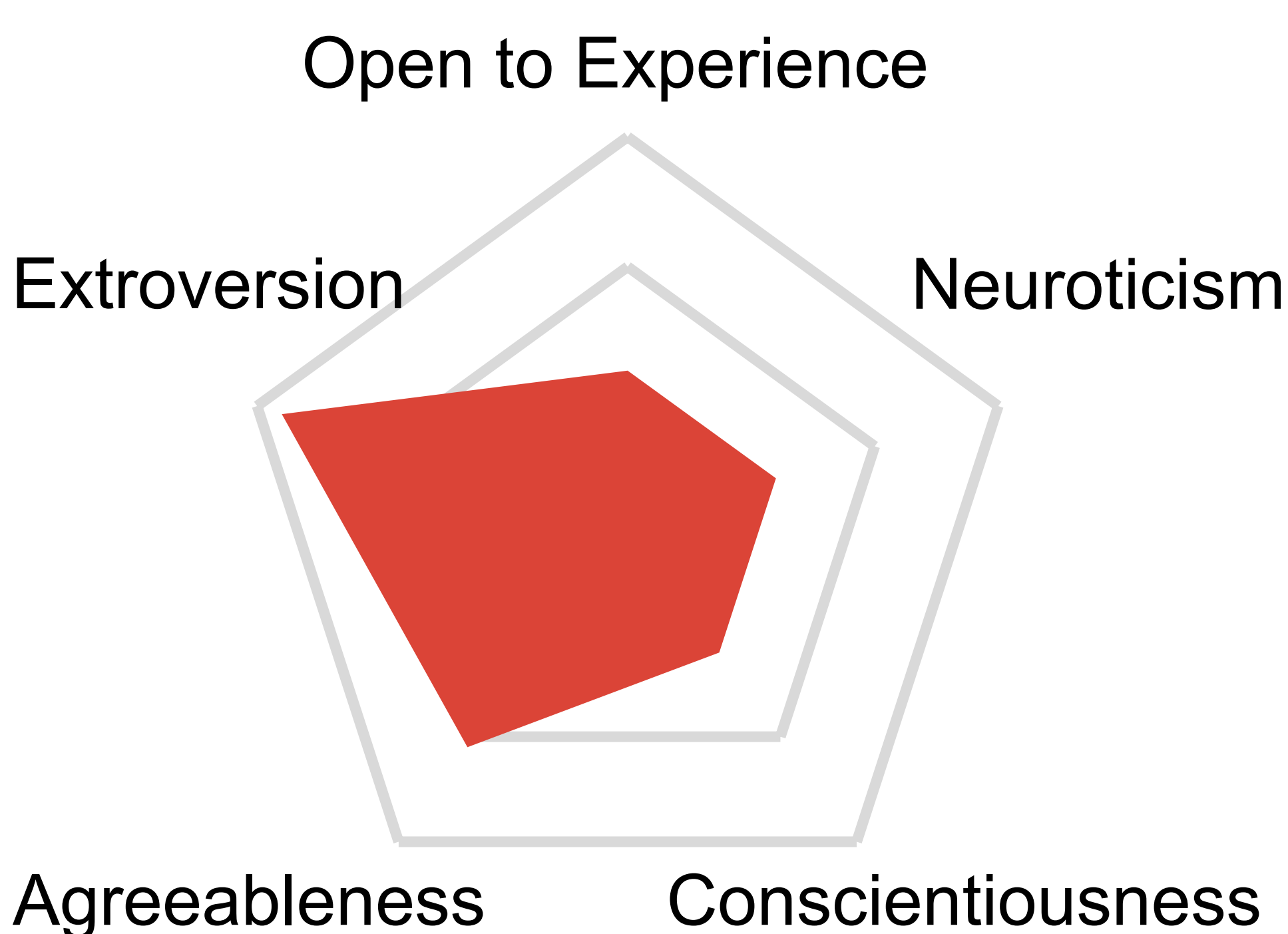
## Challenges



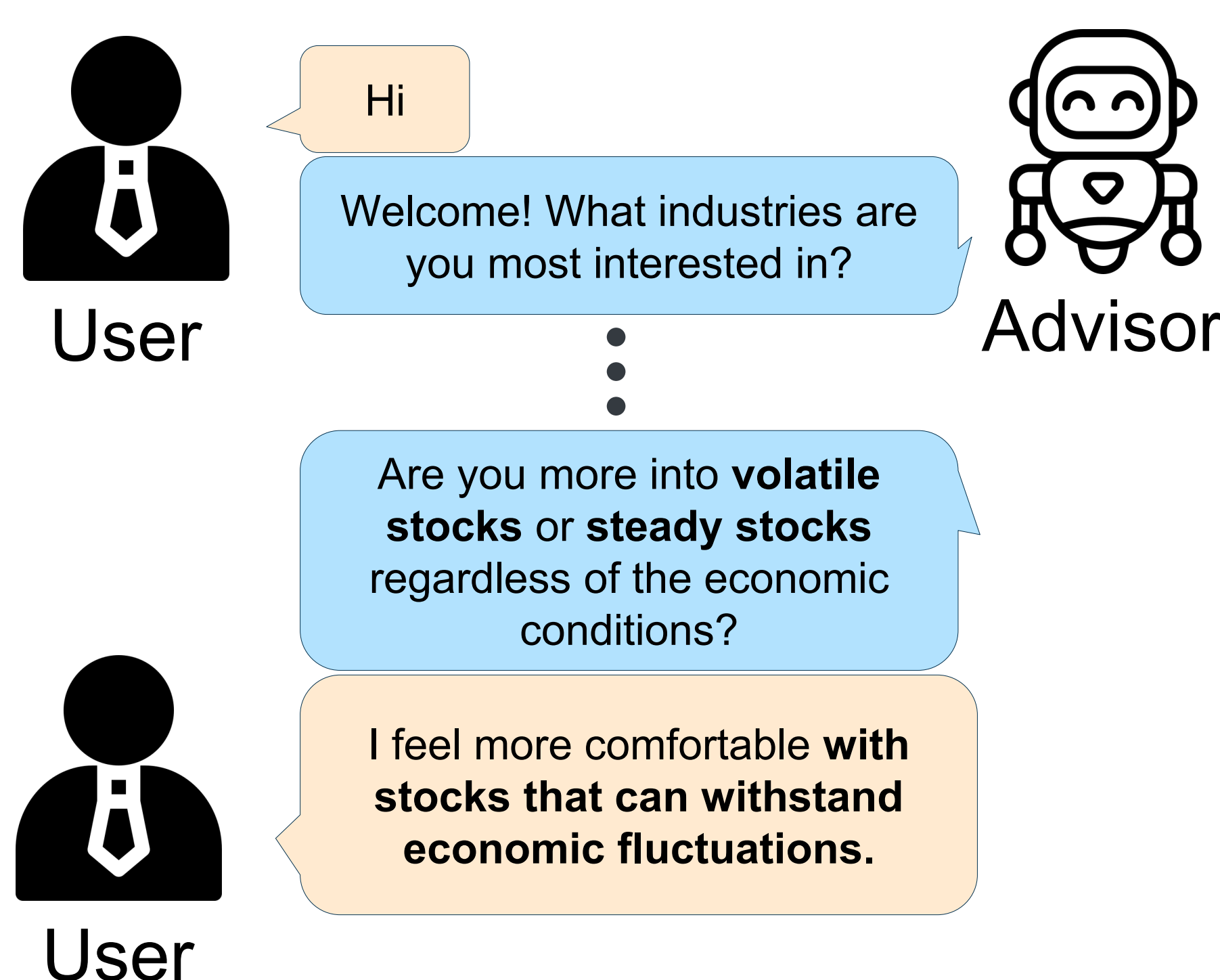
FinPersona is an LLM-driven conversational agent for personalized financial advising. It empowers non-expert users to explore investment options through a dialogue tailored to their individual circumstances.



## Personality Injection



## Preference Elicitation



## Personalized Stock Assessment

