

# UX Map



## **Team Crawford**

Lauren Buie, Ava Glassen, Marisa Gu,  
Shahla Le, & Deborah Yoon

# Persona



## **Linda Ford**

*Age:* 53

*Occupation:* Anesthesiologist

*Location:* Johns Creek, GA

*Behavior:* Practical,  
organized, and caring

*Tech Experience:* Medium

### **Biography**

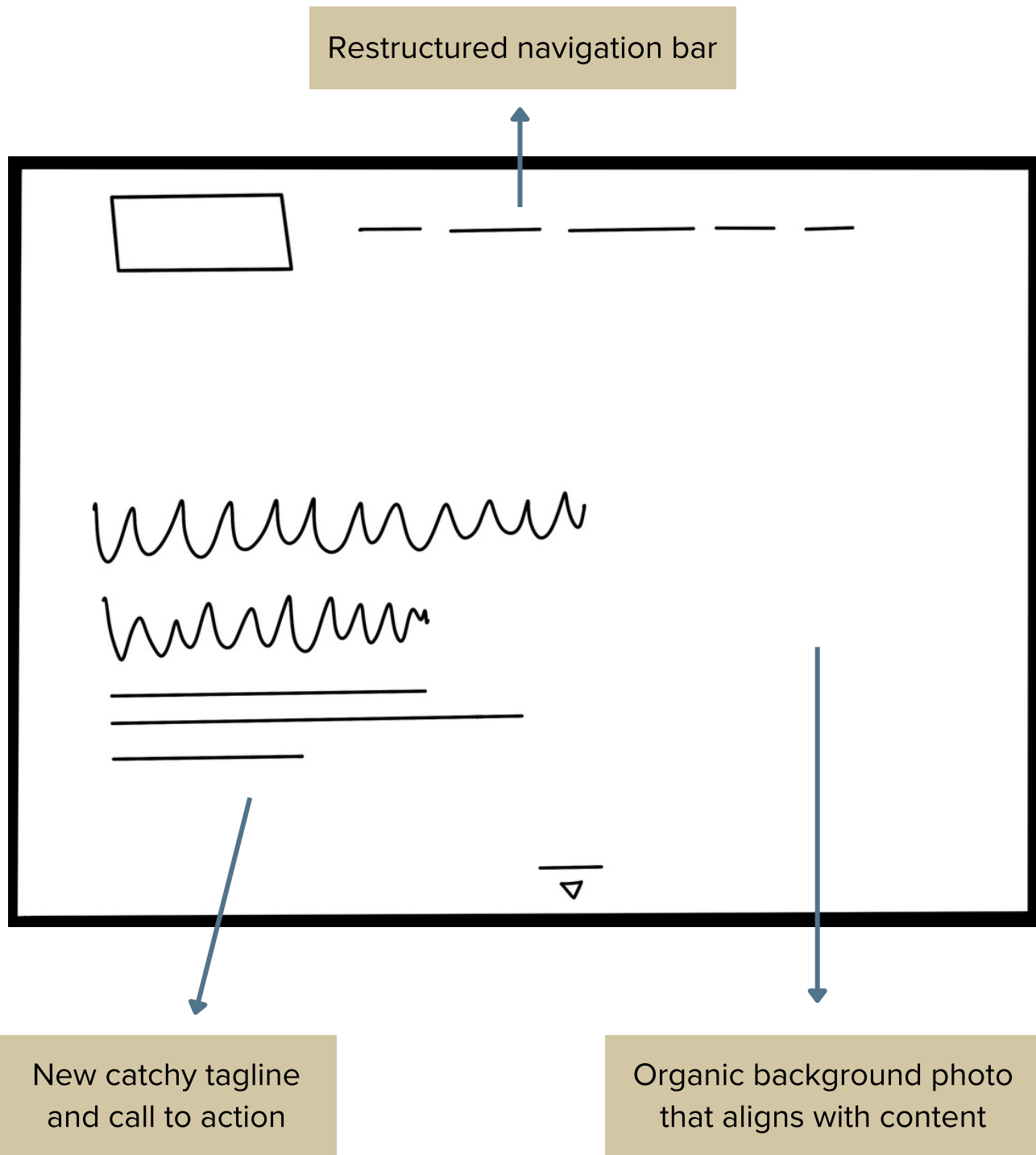
Linda Ford is an accomplished Anesthesiologist with nearly three decades of experience in the medical field. She is also a mother to three children and a devoted wife. Linda takes great pride in caring for her family as reflected in her involvement in their lives, all while remaining mindful of the financial responsibilities that lie ahead.

### **Goals/Needs**

As a practical planner, Linda is thinking ahead about retiring from her job but wants to ensure that she and her family will be taken care of. She is fairly knowledgeable about financial investments as she has been preparing for retirement for an extensive amount of time, but she also recognizes that there is more to learn. Linda is hoping to find an investment firm to help manage her hard-earned wealth and see a return to finance her family through retirement.

# Low-Fidelity Wireframe

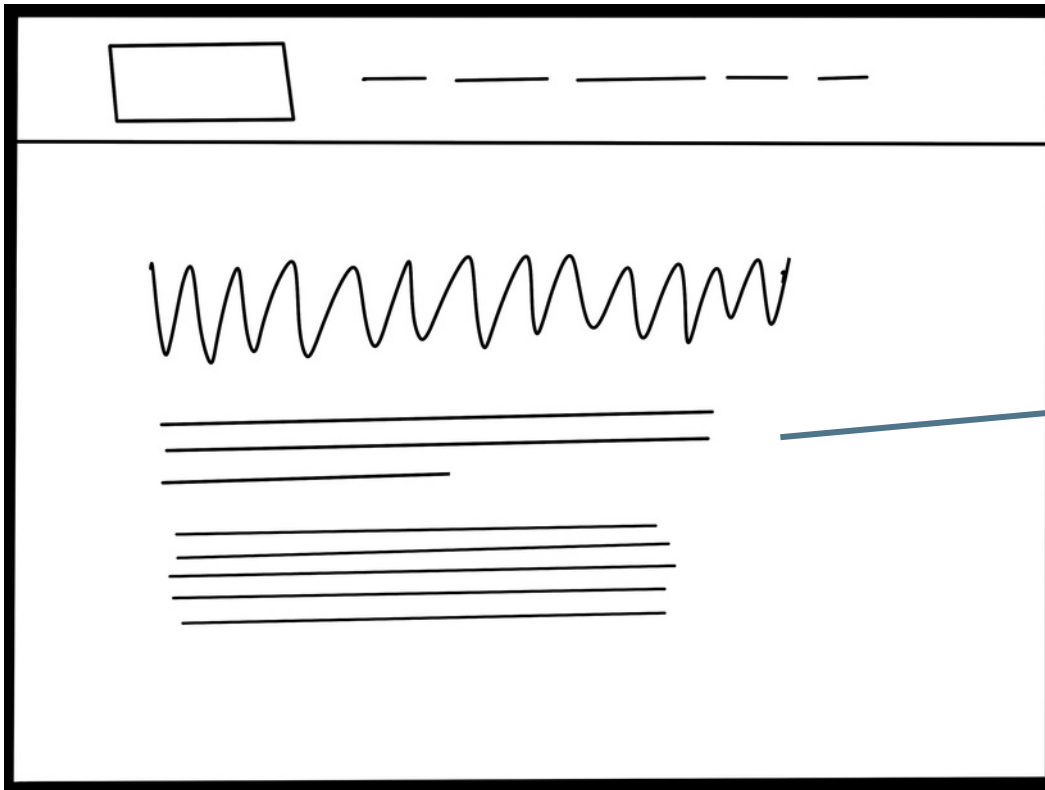
## Landing Page



Wireframes below are a continuation of the same landing page as a user scrolls down



# Low-Fidelity Wireframe

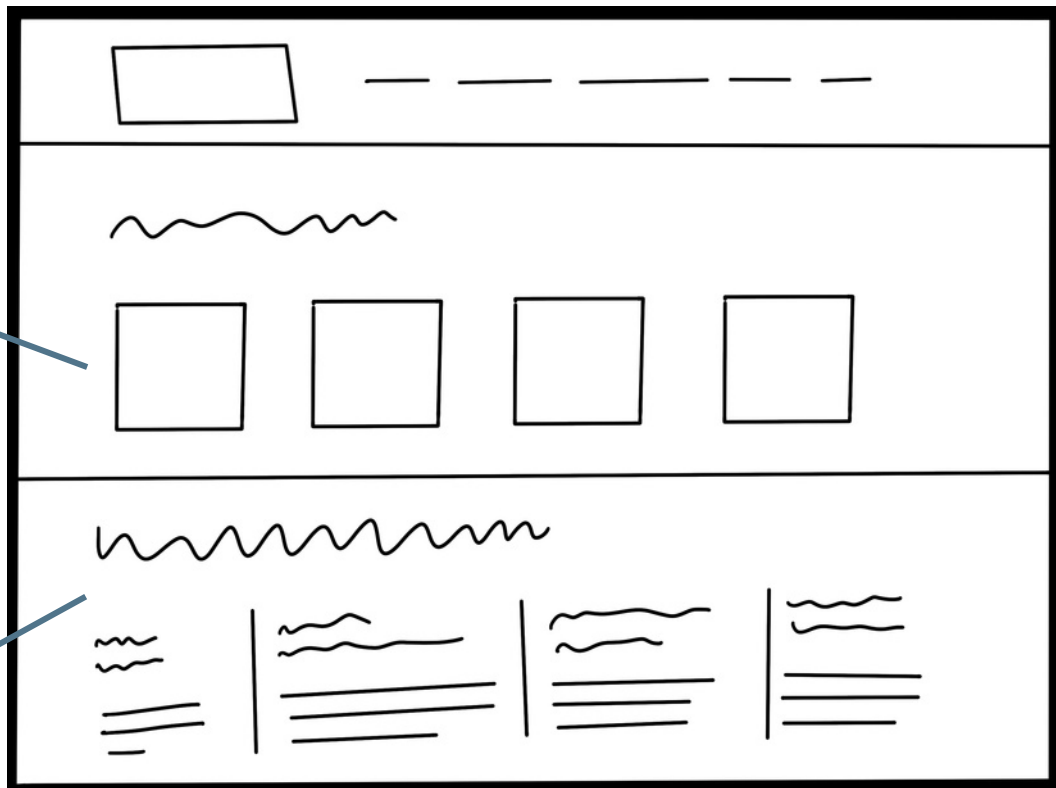


Replace Crawford brochure with a brief and concise summary of Crawford and website content

## Summary Section

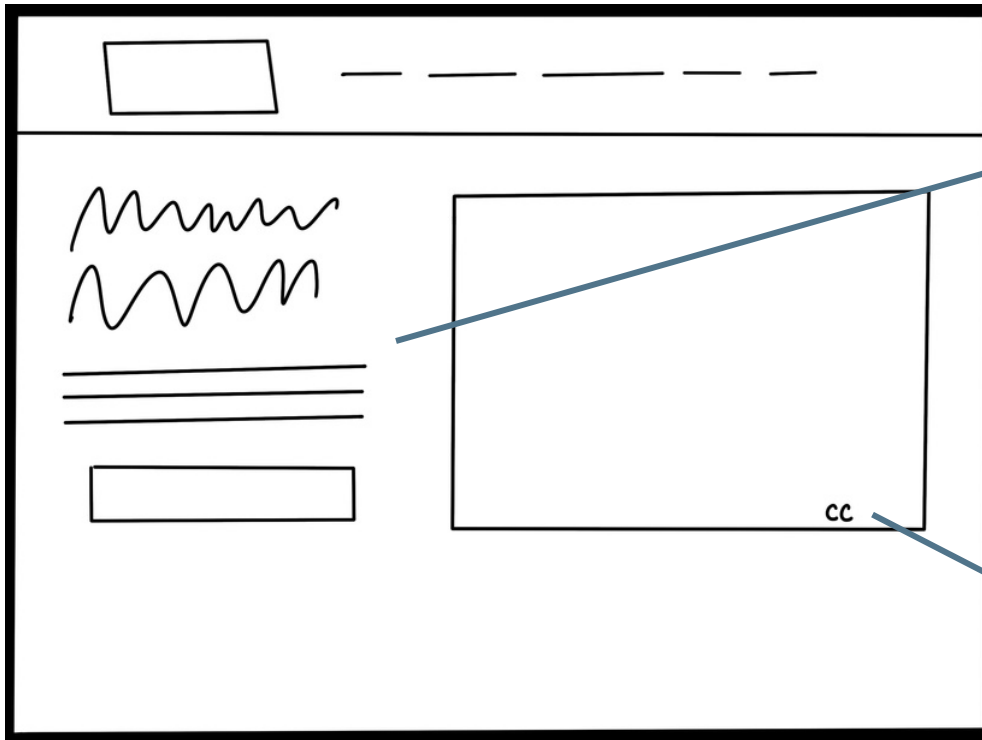
## Numbers & Keys to Client Success

Find more compelling statistics and rearrange order of boxes, use brand kit



Replace title and change background photo

# Low-Fidelity Wireframe



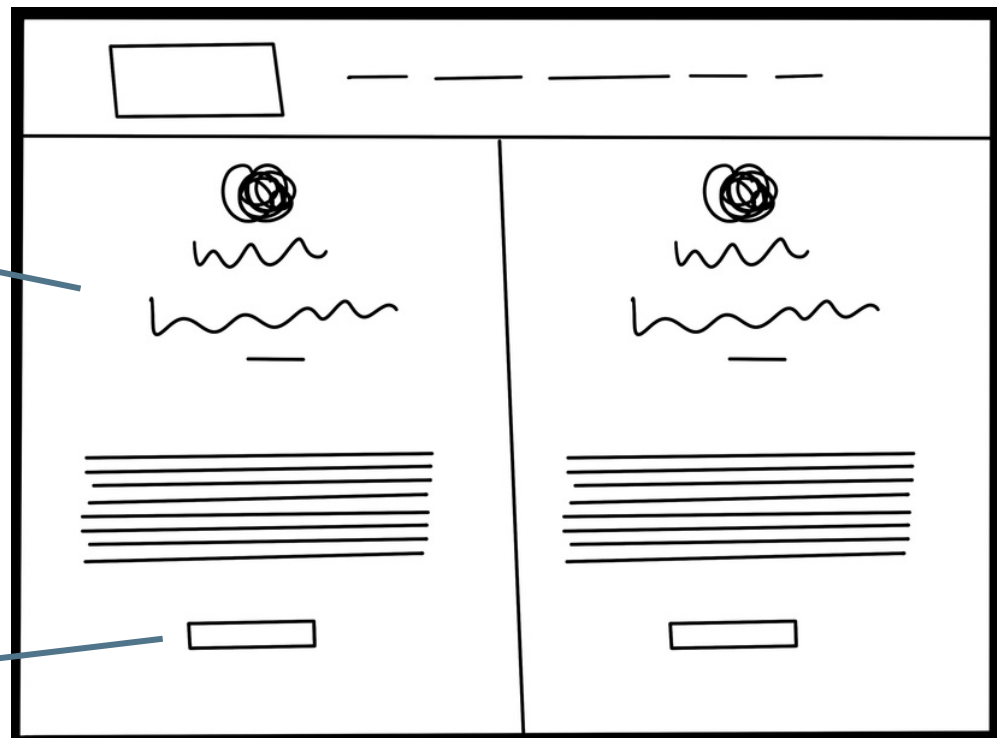
Condense left column to a title, quote, and a button that says "Reflections on 40 Years"

Add captions for accessibility

## Message From Founder

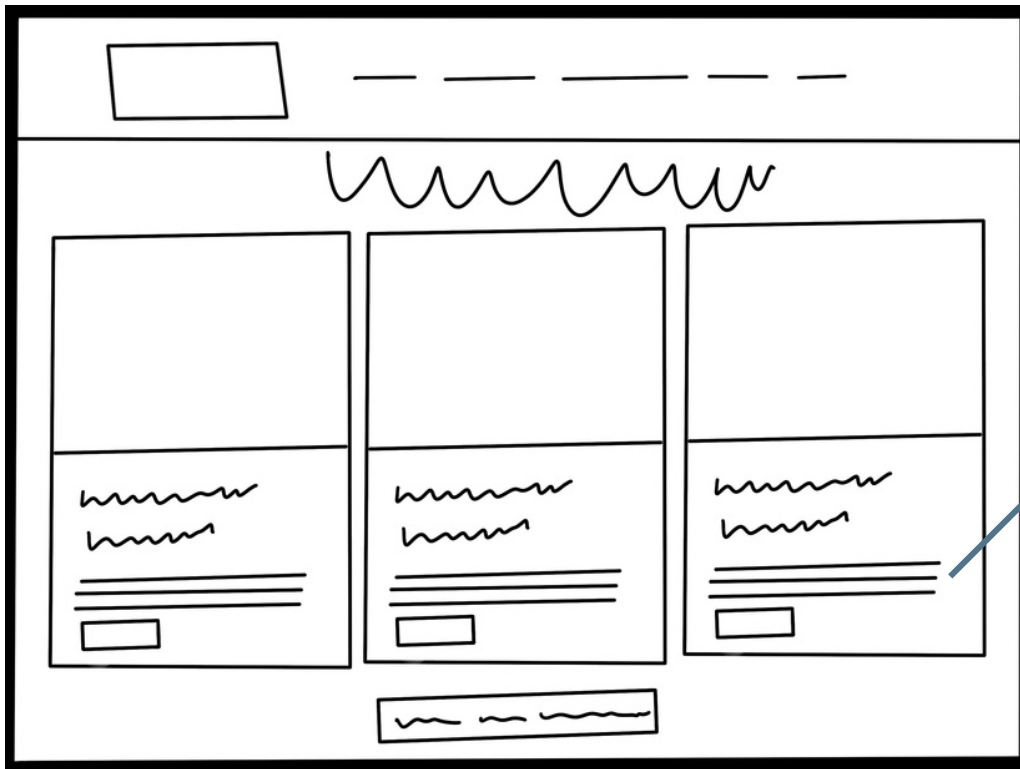
## Client Experience & Investment Philosophy

Change to two static boxes with information permanently showing



Make button to send user to new section

# Low-Fidelity Wireframe

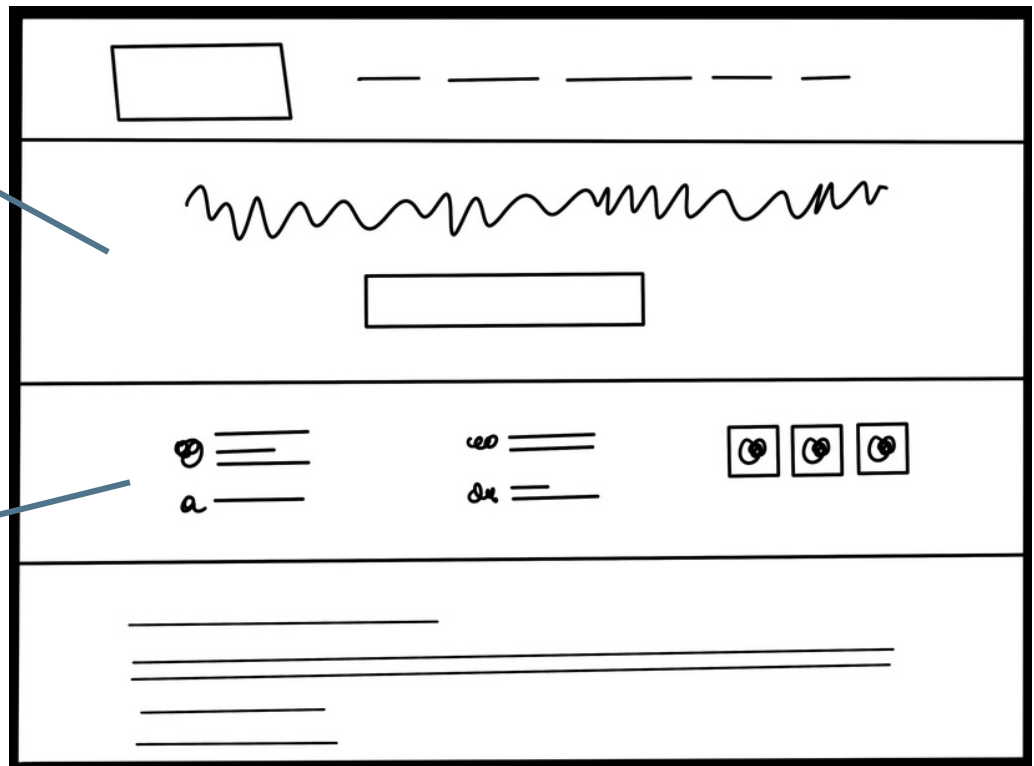


Add preview blurbs

Latest Perspectives

## Call to Action & Footer

Change call to action phrase

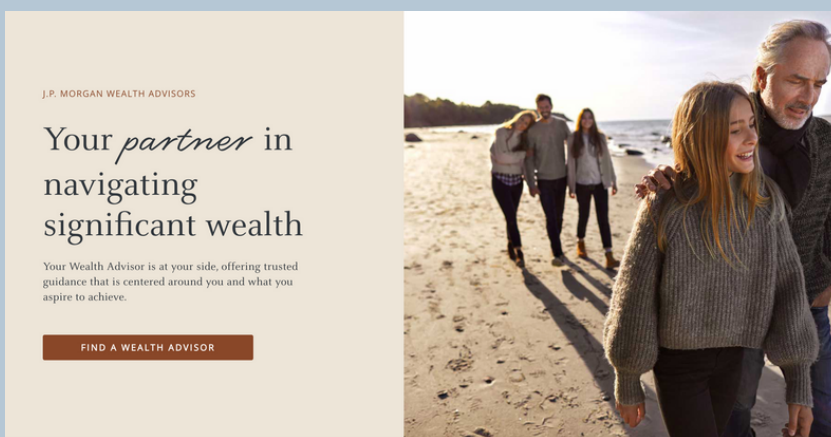


Reorganize information into columns and add icons

# UX Inspiration

While we wait to hear back from Cameron and the Portfolio Managers about the main goals for website users and their user journey, we have looked at other investment advisor websites to note website features (UX & content) that we liked. We studied other engaging websites from large investment firms, including Vanguard, J.P. Morgan, and Charles Schwab. Based on our review of the websites, we have compiled a list of notable website features.

## Landing page featuring a natural photo, catchy tagline, and action items



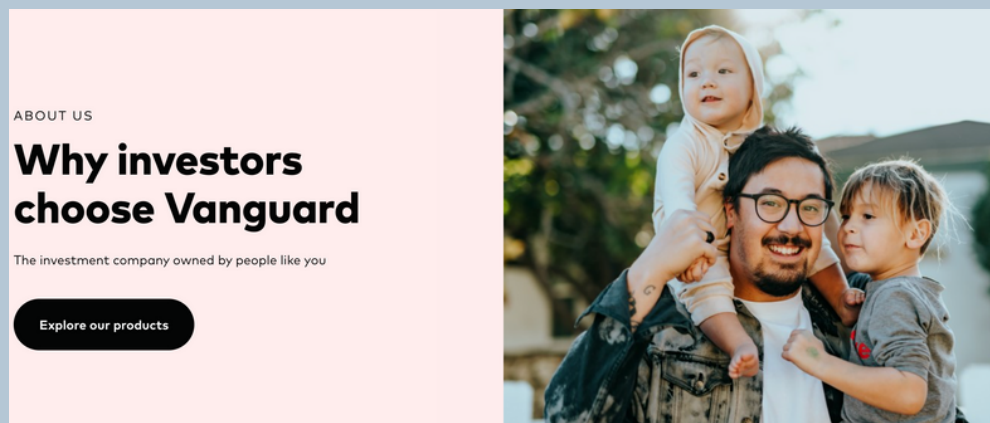
J.P. MORGAN WEALTH ADVISORS

Your *partner* in navigating significant wealth

Your Wealth Advisor is at your side, offering trusted guidance that is centered around you and what you aspire to achieve.

[FIND A WEALTH ADVISOR](#)

A photograph of a family walking on a beach at sunset. A man and woman are in the foreground, smiling, with two children walking behind them.



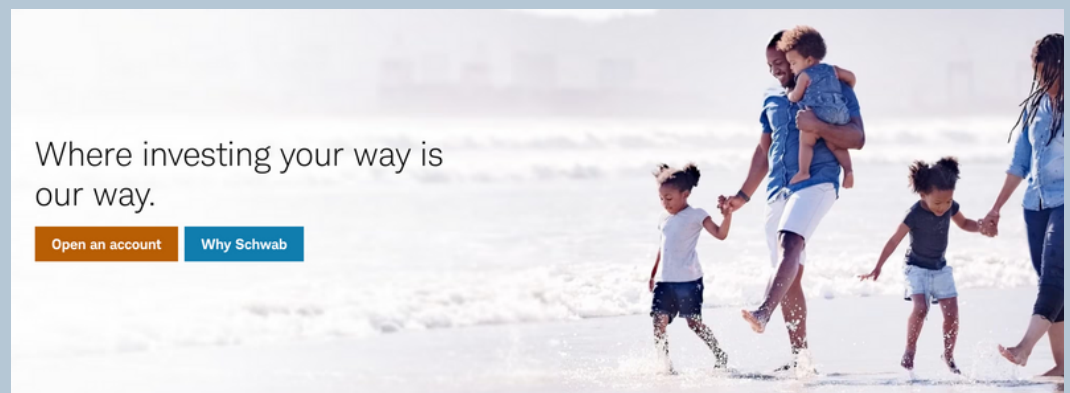
ABOUT US

**Why investors choose Vanguard**

The investment company owned by people like you

[Explore our products](#)

A photograph of a man with glasses and a beard smiling, holding a baby on his shoulders and a young child in front of him.



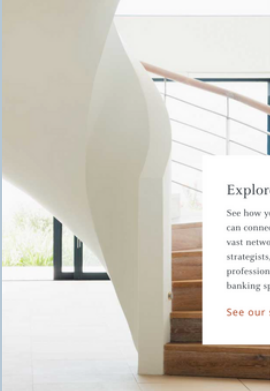
Where investing your way is our way.

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A photograph of a family walking on a beach. A man is carrying a child on his shoulders, and a woman is holding the hand of another child.

# UX Inspiration

## Well formatted copy along with graphics (easy and engaging reading)



### Dedicated to serving *you*

#### Explore our services

See how your Wealth Advisor can connect you to J.P. Morgan's vast network of investing strategists, wealth planning professionals and lending and banking specialists.

[See our services >](#)

#### Meet our advisors


Use our Wealth Advisor search tool to find an advisor that resonates with you, then reach out to them directly by phone or email to tell them about your specific needs and priorities.


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#### See our approach


Learn about our highly-personalized approach to wealth management, and explore our secure digital tools, cybersecurity resources and community initiatives.

[Learn about us >](#)

- **Ongoing support**

We'll monitor your investments and rebalance your portfolio as needed.
- **Low-cost investing**


For all-index investment options, you'll pay no more than \$2 a year for every \$1,000 Digital Advisor manages.<sup>2</sup>
- **Potential tax reduction\*\***


Take advantage of our free tax-loss harvesting  service to help reduce your tax bill and keep more of your returns.


### The Benefits and Risks of Fixed Income Investing


Benefits	Risks
Fixed income investments generally carry lower risk than stocks. They also function well as a way to generate income or value from your investments on a consistent basis.	Just because fixed income funds usually are less risky options doesn't mean there is no risk involved. As with stocks, your fixed income investment could be affected by external factors such as market conditions, inflation, or interest rates.


Think about your fixed income objectives.


- **Generate Income**

Use fixed income securities to provide a regular, predictable stream of revenue.
- **Protect your investments**

Add stability to your portfolio with high-quality fixed income investments, like Treasuries, CDs, or other highly rated bonds.
- **Diversify your portfolio**

Help smooth out the highs and lows in a stock portfolio with fixed income securities.
- **Create tax benefits**

Some fixed income securities, like municipal bonds, generally have preferential tax treatment where coupon payments  may be exempt from federal and state income taxes.

[Live Chat](#) 

## Buttons to jump to sections on a page which also become a secondary navigation bar when page is scrolled

### Commission-free trading online. Same award-winning experience.

- \$0 online trades\* + \$0.65 per options contract<sup>3</sup>
- No account or trade minimums
- No hidden fees

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Trading Fees and Commissions   Account Fees and Minimums   Investment Management Fees and Minimums   Common Questions   [Open an account](#)

#### Trading Fees and Commissions

Trading Fees and Commissions

Trading Fees and Commissions	Account Fees and Minimums	Investment Management Fees and Minimums	Common Questions	Open an account
<b>\$0</b> <b>Listed Stocks and ETFs</b> <small>online commission<sup>1,2</sup></small>	<b>\$0</b> <b>Options</b> <small>online base commission + \$0.65 per contract fee<sup>3</sup></small>	<b>\$0</b> <b>Mutual Funds</b> <small>on thousands of funds from Schwab Mutual Fund OneSource<sup>4</sup></small>		
<b>Listed Stocks and ETFs<sup>1,2</sup></b>	<b>\$0 online commission</b>	<b>\$0 + \$25 service charge</b>		
<b>Options<sup>3,5</sup></b>	<b>\$0 online base commission + \$0.65 per contract</b>	<b>\$0.65 per contract + \$25 service charge</b>		

### Holistic investment management

Your Wealth Advisor will help you allocate your assets, navigate market trends and make strategic investment decisions informed by the Top Global Research Firm, #1 Equity Research Team and #1 Global Fixed Income Research Team.

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### An investing experience centered on *your* goals

When you invest with us, your Wealth Advisor examines your full financial picture to ensure that your portfolio and wealth plan are working together to help you achieve what's most important to you and your family.

- 1**  
DISCOVERY  
First, your Wealth Advisor will learn about your current lifestyle and future aspirations and help you define your personal and financial goals.
- 2**  
ANALYSIS  
Next, your Wealth Advisor will build a personalized wealth management plan based on your risk tolerance, time horizon and liquidity needs.
- 3**  
ACTION  
Your Wealth Advisor will identify opportunities that align with your priorities and transition your assets into a custom-built portfolio.
- 4**  
MONITOR  
As market conditions evolve, your Wealth Advisor will connect with you regularly and help you adjust your portfolio to support your life journey.



# UX Inspiration

## FAQ section

Vanguard | Digital Advisor® No advisory fees for 90 days.<sup>3</sup> [Get started](#)

### Frequently asked questions

**How much does Vanguard Digital Advisor cost?**

You'll pay no advisory fees for the first 90 days.<sup>3</sup> After that, you'll pay no more than 0.20% in advisory fees for all-index investment options or 0.25% for an active/index mix, depending on your elections. In other words, for every \$1,000 Digital Advisor manages you'll pay no more than \$2 each year for all-index investment advice (or no more than \$2.50 in advisory fees for an active/index mix). (See our [fee calculator](#) above or disclosures below for more details on fees.)<sup>2</sup>

You should consult your plan fee disclosure notice for the applicable gross advisory fees that apply to your plan (401k) account.

For more information on Digital Advisor's fee structure, refer to [Form CRS and the Vanguard Digital Advisor Brochure](#).

What's the minimum amount I need to enroll in Vanguard Digital Advisor?

What else do I need to know about my Vanguard Brokerage Account/settlement fund before I enroll?

Who's eligible to enroll in Vanguard Digital Advisor?

We encourage your questions.

Here are answers to some top questions from investors like you:

- + What is the Schwab Security Guarantee?
- + How much does it cost to work with Schwab?
- + How do I open an account?
- + What kind of investment products does Schwab offer?
- + How easy is it to switch brokerage providers?
- + Why should I bank with Schwab Bank?

Have more questions? We're here to help.

Call Chat Visit

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## Navigation bar and sub-sections are well defined and organized

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Personal Choice Retirement	Research	Stocks	Home Loans & Rates	Schwab Personalized Indexing™
Small Business		Options	Strategic Borrowing	Retirement Income Solutions
Accounts by Financial Goal		Bonds, CDs & Fixed Income	Credit Cards	Environmental, Social and Governance (ESG) Investing
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		Cash Solutions & Rates		
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# UX Inspiration

## Clear and direct explanation of why a firm is different (“Why \_\_\_”)

Achieving your financial goals    Transparent pricing, always    **You have our guarantee**    Expertise at the ready    Ranked #1


Satisfaction and security guarantees? At Schwab, the answer is: "Absolutely."



### Satisfaction guarantee.

If for any reason you're not completely satisfied, we'll refund any eligible fees or commission. You won't find that kind of promise everywhere – but you will find it here.

[What our guarantee covers](#)



### Security guarantee.

We cover losses in your Schwab accounts due to unauthorized activity. Plus, we help keep you secure with two-step authentication and tips on spotting scams.

[Learn more about our security guarantee](#)

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The investment company owned by people like you

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## “Perspectives” layout includes filters, blurbs, and titles that are interesting and relevant

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Understand where you are today and create a roadmap to get you where you want to be.


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