



Wizard DESIGN SYSTEM

Created and Implemented by Macy Adams

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WHAT IN THE WORLD IS WIZARD?

Wizard

We are a subscription-based web service designed to elevate financial literacy and provide actionable insights for retirement savings optimization. The service leverages the proprietary technology and intelligence of Carnivore Trading, delivering monthly reports influenced by up-to-the-minute market trends.

In the current market, a significant void exists for a market-tailored, intelligent financial teaching and modeling service that is both affordable and educational, particularly for individuals from the Gen Z and Millennial demographics.

For these groups, conventional financial advisory services remain largely inaccessible, creating a demand for solutions that not only help to grow their retirement savings but also empower them with the knowledge to take control of their financial future.

Today's resources often fall into two categories: Internet searches, which while abundant, tend to offer generalized advice that lacks actionable strategies; and financial advisors, whose services, although highly specialized, come with a hefty price tag and often leave individuals in the dark about their own finances.

Our product seeks to bridge this gap, **offering a solution that combines the specificity and intelligence of a financial advisor with the accessibility and educational value necessary for younger generations to feel comfortable and prepared for their future.**

MISSION AND VOICE

Mission

“To democratize access to industry-leading retirement market insights and principles, empowering individuals to build a path to long-term financial wellness.

Voice

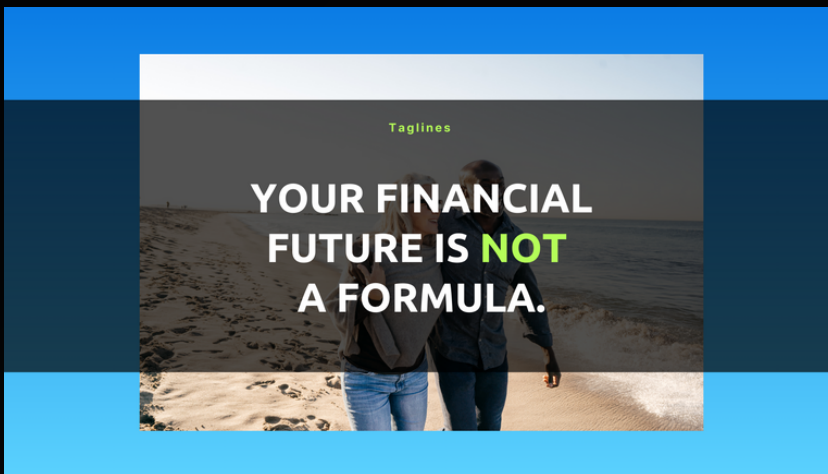
For many individuals, family is the source of information on financial topics that the education system doesn't cover. To be an effective mouthpiece for sharing this information, we want to embody the **warmth, trustworthiness, and engaging touch of a family figure** - with the added benefit of being some of the top talent in the investment space. Thus, we want to create a Wizard family with engaging, fun content backed by expert knowledge.

Trait	Description	Do	Don't
Fun	We want to embody fun and entertainment as medium's of delivering value through content.	<ul style="list-style-type: none"> • Be inspiring • Be unheard of • Be charismatic 	<ul style="list-style-type: none"> • Be forgettable • Be generic • Be cookie-cutter
Expert	We are committed to making sure our insights are of the highest tier of accuracy and clarity.	<ul style="list-style-type: none"> • Be data-driven • Be clear • Be relevant 	<ul style="list-style-type: none"> • Be unreliable • Be inconsistent • Be wrong (without being honest)
Nonconformist	Our leaders left the financial services industry because they wanted to replace bureaucratic mediocrity with genuine connections.	<ul style="list-style-type: none"> • Be true • Be transparent • Be unapologetic 	<ul style="list-style-type: none"> • Be boring • Be dull • Be timid

TAGLINES FOR THE BRAND

One-liner phrases to help our audience quickly see our brand's value

Tagline #1



Value= This product is unique and custom

This tagline will be our primary tagline featured on the homepage.

Tagline #2



Value= This product makes life easier

As a secondary pitch, we wanted to add tagline #2 for promotion on other pages

Examples of Brand Imagery

Imagery Buzzwords: High tech, stocks, fintech, people, collaboration, laughing, freedom, money, comfort, energy



Examples of Merch



Color Palette

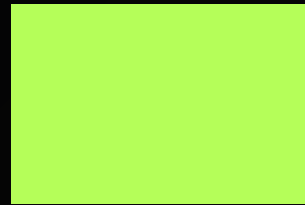
Primary Colors



*Calming,
Trustworthy,
Young*

TAX-BENEFIT TEAL

#59D2FE



*Energized,
Prosperous,
Fun*

GEN-Z GREEN

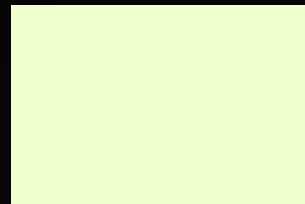
#B5FE59



*Proud,
Intelligent,
Bold*

WIZARD BLUE

#0A7CE4

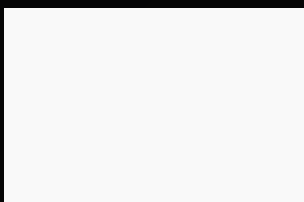


*Relaxing,
Wise,
Secure*

ENLIGHTEN GREEN

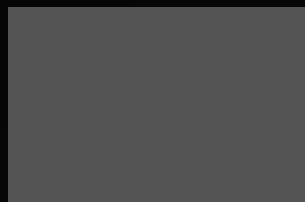
#F0FFCE

Secondary Colors



LIGHTBULB WHITE

#F9F9F9



GREY-AREA GREY

#545454



GRATEFUL GREEN

#88D822

Typography Guidelines

Heading 1

H1

Text-Transform: Uppercase

Text Size: 44 Points

Text Style: Ubuntu, Bold

Additional: 0 Kerning, 0 Tracking

Heading 2

H2

Text-Transform: Capitalize

Text Size: 36 Points

Text Style: Ubuntu, Bold

Additional: 0 Kerning, 0 Tracking

Heading 3

H3

Text-Transform: Capitalize

Text Size: 24 Points

Text Style: Ubuntu, Bold

Additional: 0 Kerning, 0 Tracking

Sub-heading

SH

Text-Transform: None

Text Size: 16 Points

Text Style: Inter, Bold

Additional: 0 Kerning, 0 Tracking

Body Paragraph

Body

Text-Transform: None

Text Size: 12 Points

Text Style: Inter, Regular

Additional: 0 Kerning, 0 Tracking

USAGE GUIDELINES

Typography Guidelines

- Make sure the typefaces you will use for the project are legible and easily readable
- Stick to hierarchy and size
- Ensure fonts are used to maximize contrast and readability.

Dos and Donts: Do use a variety of sizes to match needs and visibility, do use our branded colors on text to create “pop,” do focus on capitalization. Do not provide low contrast with background, do not make text too small or overwhelmingly large, do not change the spacing.

Color Palette Guidelines

- Make sure there is high color contrast between any text and the background
- Use our bright colors with intention and balance with neutral colors
- Make sure logo does not get lost by putting it over conflicting colors
- Unless needed for contrast purposes, use #F9F9F9 and #050505 over harsher pure white and black.

LOGOS

Dark Background Pictorial Logo



Dark Background Combo-Mark Logo

Wizard

Light Background Pictorial Logo



Light Background Combo-Mark Logo

Wizard

LOGO BREAKDOWN

Logo Overview

With these logos, our company wanted to make an illusion to a wizard figure that seems to be all-knowing and could be something you turn to for out-of-this-world wisdom. Got a problem? Ask the Wizard.

From here, to add visual interest and movement, we manipulated the Z to be an avant-garde hourglass.

Here, the hourglass represents a focus on time, which in our case, is one of our main value propositions - giving you time back by reducing the time it takes to retire. Because we are entering the fintech landscape, we chose a trendy, innovative tech feeling sans-serif that we further rounded out. Additionally, to imply this cutting-edge tech feel, we employed a visually appealing gradient to look fresh, fun, and trendy.

Usage Guidelines

Guidelines: Do keep the proportions, do ensure adequate contrast for readability, do use on content produced by the company. Do not clip the picture, do not include other colors, do not put on other companies trademarked content, do not lower opacity.

The logo for 'Wizard' features the word in a white, rounded sans-serif font. The letter 'Z' is replaced by a blue hourglass icon with a white gradient.

Component Library

Component 1: Buttons

Description: Buttons will be used throughout the application; however, it is especially important for us to tie visual identity to the subscribe functionality throughout. We plan to use this button format - text, high contrast, icon to the right - everywhere subscription is referenced to funnel users to product purchase.



Icon: Font Awesome Solid

Border Radius: 4 px

Font: Ubuntu Regular, 24px

Function: Link to the subscription page

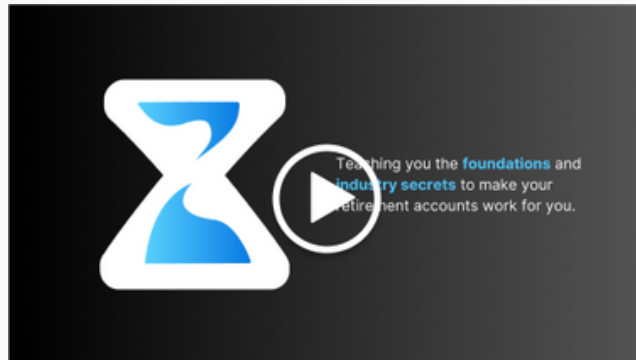
Colors: Light → #050505 with #f9f9f9 font. Dark → #B5FE59 with #050505 font

State: The button will depend on light or dark background status, and each will slightly enlarge on hover.

Component Library

Component 2: Videos

Description: Because this product is an educational product and a blue ocean strategy idea, we hope to employ videos throughout. To standardize videos, we want to consistently employ our brand colors, tone, and imagery while displaying a constant clean UI with sharp edges and a simple start button.



Margins: 20 px

Border Radius: 0 px

Icon: Font Awesome Play Button

Function: Pull up a lightbox with video content

Colors: Set a cover image with consistent branding depending on key value of content

State: The video will open on click. If not fully loaded, it will display the default loading animation.

Component Library

Component 3: Blog Post

Description: Through our learning center, we want to make educational blog content. Because this content will likely be new, we want to add clarity with relevant tags (“investment type”), simple naming conventions, and article images (constructed with supporting visuals, an overlay, and large font). This standard format will quickly help with concept clarity.



ACCOUNT TYPES

UNDERSTANDING IRAS

Oct 10, 2023 3 Min Read

Individual Retirement Accounts (IRAs) are powerful financial tools designed to help individuals save for their retirement. For many,...

READ MORE →

Image: 10 px border-radius, 870p x 570px

Image Content: Ubuntu Bold, FreePix Image, #050505 54% overlay

Divider: 1 px, #050505 42% opacity

Text: Title → Ubuntu Bold 36px #050505, Other → Inter regular 12px #545454

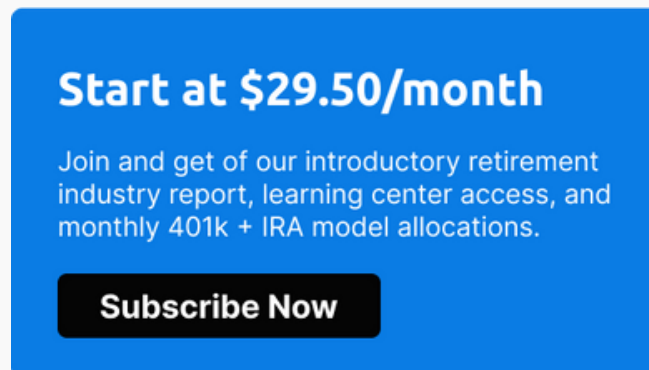
Function: Reference to blog content

State: On hover, the image and the title dull to a light grey. On click, the website launches pre-made articles.

Component Library

Component 4: Subscription Box

Description: When navigating our website, users will encounter a subscription block explaining the value and cost structure of our product. Additionally, we employ a call to action button with contrast to pull the user into our subscription process. This block design allows users to compare solutions quickly.



Background: 10 px border-radius, #0A7CE4

Font: Ubuntu Bold 36px, Inter Regular 12px, Inter Bold 18px, #FFFFFF

Function: Describe value and transport to the subscription process

State: Entire area has 2px 2px 2px 2px box shadow with #59D2FE on hover to show which option you are considering.

Component Library

Component 5: Email Collection

Description: This component allows our company to exchange an email address for a pdf download of an introductory retirement savings report. Here, this component allows users to type in their email, which must meet the email format, and then confirm by pushing the button. Here, we use an industry-standard download icon to use formats consumers are used to.

A mockup of the email collection component. It features a white rectangular input field with a thin grey border and the placeholder text "Email Address" in a light grey font. To the right of the input field is a blue rectangular button with rounded corners. The button contains a white download icon (a square with a downward-pointing arrow) followed by the text "Download Your Report" in white font.

Attributes:

Border-Radius: 5 px border-radius, 2 px border, #E6E6E6

Font: Inter Regular 12 px, Ubuntu Regular 12 px, #E6E6E6

Function: Collect user information and start the learning journey with Wizard.

State: When you click into email address, the text clears and allows typing. The button function requires the email to contain "@" and ".com, .org, .net, etc." to validate and download the retirement PDF.

Pattern Library

Pattern 1: Navigation Bar

The top navigation bar allows users to navigate easily through our various pages. Because some of our core content requires people to have paid for an account, the tabs “Learning Center” and “Monthly Report” will have minimum functionality to users who have not signed in. To the far right, the logo will allow users to get back to the home page to reset easily. Correct uses of this navigation bar would be to click through the respective pages and be able to acquire information easily. Incorrect uses would be to sign in before signing up or trying to get content without paying.

The logo for Wizard, featuring the word "Wizard" in a white, sans-serif font on a blue background.[How It Works](#)[Learning Center](#)[Monthly Report](#)[Sign In](#)[Sign Up](#)

Pattern Library

Wizard [How It Works](#) [Learning Center](#) [Monthly Report](#) [My Account](#)

[Home](#) > [ETFs](#) > [A Beginners Guide to ETFs](#)

A BEGINNERS GUIDE TO ETFS

ETFs Investment Types / Sep 28, 2023 / 3 Minute Read

Hello Wizard Family,

Today, we're delving into the exciting world of ETFs – a critical component of modern retirement account asset allocations.

So, what exactly is an ETF?

Think of an ETF as your gateway out of the limited world of single stocks. Say you've always invested in individual companies, like Pfizer. But what if you didn't want to place all your bets on just one company? What if you believed in the potential of the entire healthcare industry? That's where ETFs come into the picture.

ETF stands for Exchange-Traded Fund. Essentially, it's a collection of various stocks or securities that represent a particular theme or index. You can think of an ETF as a "party pack" of assorted stocks that offer diversification benefits.

Here's a clearer picture using the Pfizer example:

Imagine the healthcare industry is booming. However, let's say Pfizer faces an unfortunate incident, like a chemical spill, causing its stock to plummet. If you were solely invested in Pfizer, you'd be in a bit of a pickle. But if you had invested in a Healthcare Sector ETF, your investment would likely still rise with the industry trend, as the ETF wouldn't be solely dependent on Pfizer's performance.

The core idea behind ETFs: They allow you to capture broader economic and sectoral trends without having to pick individual winners.

Now, about index ETFs:

Say you admire the companies in the S&P 500. Yet, every time you choose individual stocks from this index, they don't perform as well as you'd hope. Instead of trying to cherry-pick winners, why not invest in the entire S&P 500? Yes, with an S&P 500 ETF, you can.

What if you believe the opposite? Think the S&P 500 is headed for a slump? Enter **inverse ETFs**. These are specially crafted ETFs that rise when the index they track falls. So, an inverse S&P 500 ETF would go up if the S&P 500 goes down.

Lastly, ETFs aren't just limited to stocks. If you've ever heard your parents discuss investing in gold and envisioned them hoarding gold bars, think again. They were probably referring to gold ETFs – a more practical and liquid method of investing in commodities. Similarly, currency ETFs let you bet on the performance of particular currencies without diving deep into Forex trading.

In essence, ETFs offer a simpler, diversified approach to the often-complex world of investing. They're a fantastic way to capture broad trends, hedge against specific events, or even explore new investment horizons.

CATEGORY

ETFs INVESTMENT TYPES

READ MORE

UNDERSTANDING BONDS

Investment Type

A Beginners Guide to Bonds

Aug 15, 2023

UNDERSTANDING ETFS

Investment Type

Understanding ETFs

Oct 10, 2023

UNDERSTANDING IRAS

Account Type

Understanding IRAs

Oct 10, 2023

Pattern 2: News Article

Another pattern we created helps users navigate and consume content – the news article layout. Here we use our heading 1 style to create a title and a common template of styling and spacing to deliver content. To create a smooth experience, elements like breadcrumbs and recommended articles help users know what they are learning and what they can continue to learn. In addition to other articles there are attributes of which category the content falls into. This format gives an architecture for understanding the bigger picture of your learning. Here, some do's are to read the content and continue to learn, reinforcing ideas with knowledge of where this fits into the overall landscape. Some don'ts are to take this as official financial advice, there are firm laws against advising specific actions so we want to make sure people see our content here as lesson-based.

Tool Stack



Figma for prototyping and mockups



WooCommerce for backend functionality



Adobe Illustrator for logo creation



Klaviyo for notifications and alerts



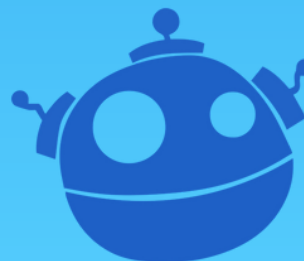
Canva for digital content creation



Wordpress for navigation and site control



Beaver Builder for front-end development



Freepix for free use visuals and videos