

INTUITIVE INVESTOR

LANDING PAGE - PUBLIC

Challenges to Address

Make it more scannable

More connection to current messaging.

Clearer language - less jargon

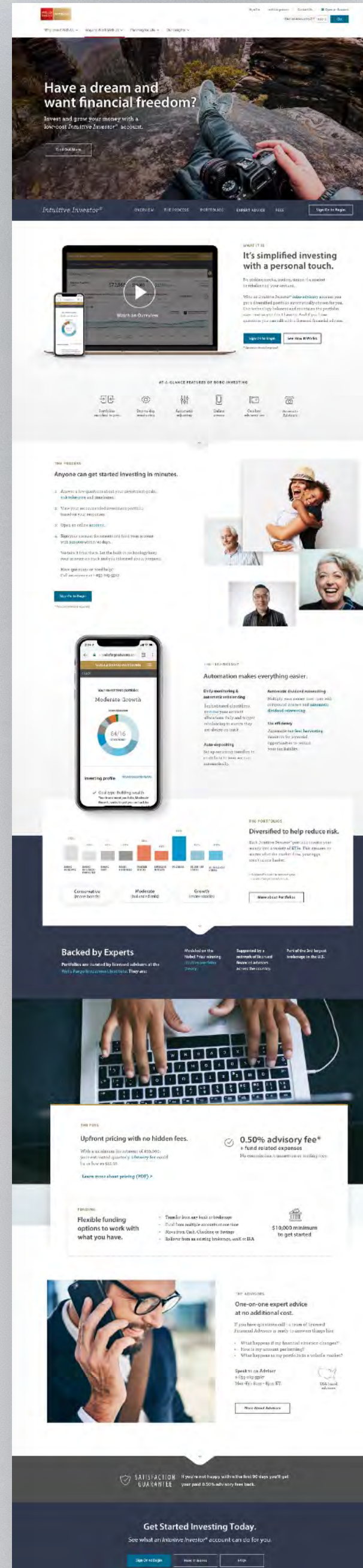
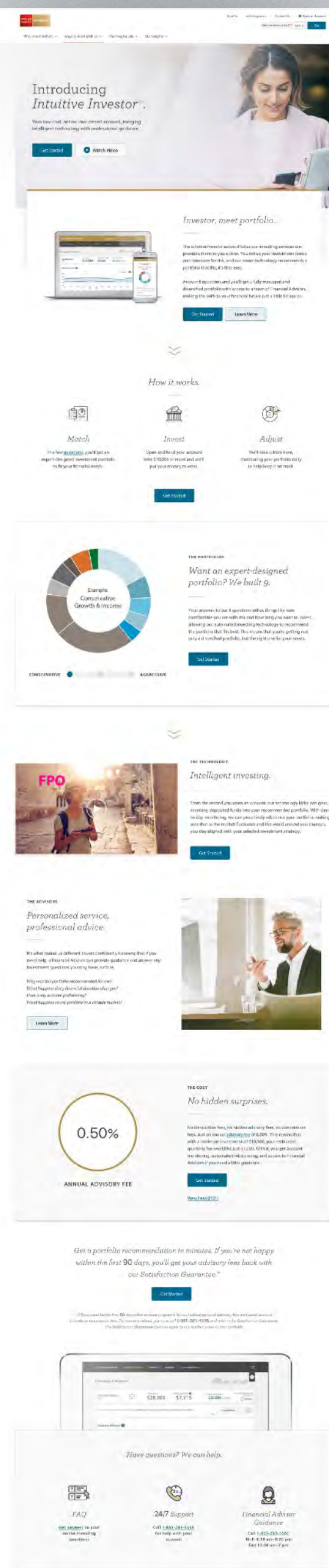
Ensure user wants are answered

Eliminate clicks

Clarify pinpoints of confusion

Make It feel more connected to the user's life.

LENGTH OF PAGE
HAS NOT CHANGED



Visual Changes -

COLOR : Addition of a singular “anchor” color

What it does - Adds richness and depth to the page which makes it feel less austere or clinical.

PHOTOGRAPHY STYLE : Aligns with WF new branding elements using perspective and emotional connects and marries with words to create “see and say” content

What it does -

- It keeps the page fresh and engaging.
- It increases the ability to digest the content by leveraging visuals and words together to tell the story.
- It increases scalability if a user scrolls down the page.

TYPE : Typefaces are the brand standards of Archer and Myriad Pro but with a twist, a reversal in hierarchy. **This would have to pass brand*

What it does -

- Makes it feel more serious, less literary. Increases both readability and scalability of headlines which have been rewritten to be more informational and straight to the brain.

Have a dream and want financial freedom?

Invest and grow your money with a low-cost *Intuitive Investor*® account.

Find Out More

Scrolls Page down to overview

Marketing Promo Area

What users want:

To be introduced to the product and a quick idea of what it could do for them.

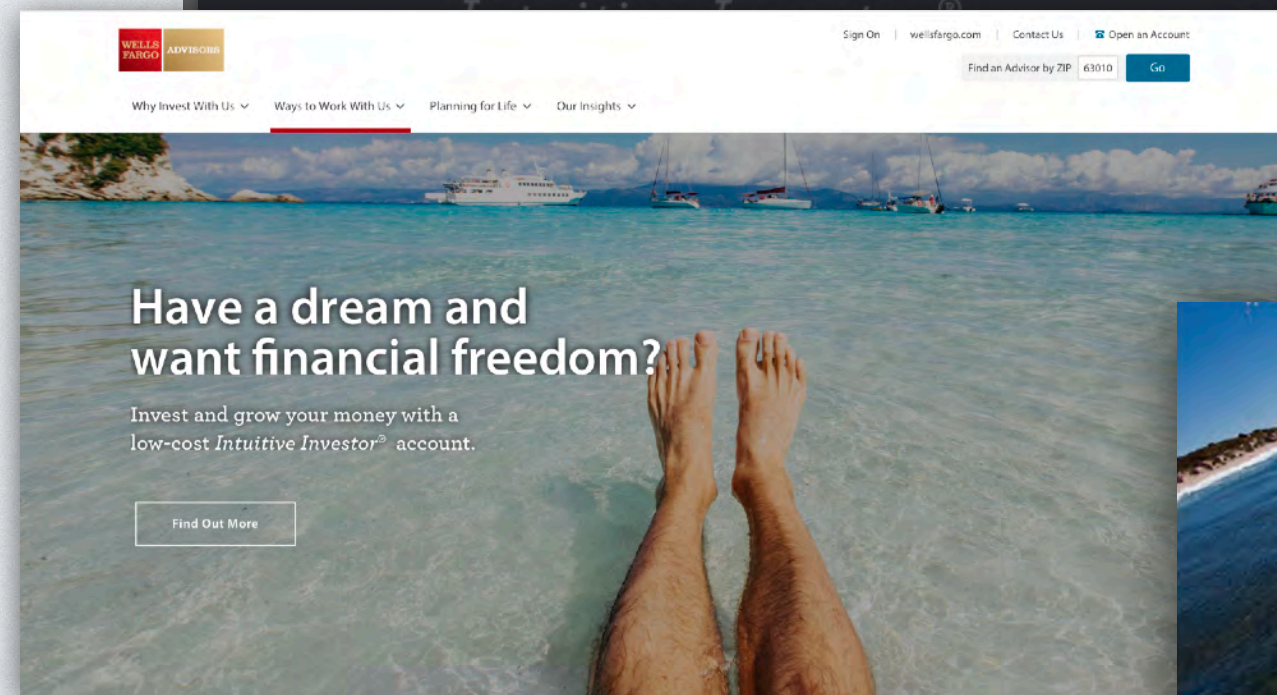
What we want: A connection point to marketing campaigns or a natural landing place for future traffic

What we did:

- Provide a connect to marketing campaigns.
- Create initial first-person emotional impression.
- Convey a sense of purpose.
- Reduce risk of polarization (see next slide).
- Make the product relevant to a user (i.e. what we do is invest your money so you can come closer to doing what you want).

Functionality:

variable background and copy area
Imagery will fade into different images to appeal to a larger audience
see next slide.



WHAT IT IS
It's simplified investing with a personal touch.

No picking stocks, trading, timing t or rebalancing your account.

With an *Intuitive Investor*® robo-ad get a diversified portfolio automatic Our technology balances and main over time so you don't have to. And questions you can talk with a licens

Tech-Powered Investing With Access to Financial Advisors

Simplify how you invest with an *Intuitive Investor*® account.

Sign On to Begin

See it in Action

Original : Users felt tech-powered was too nondescript and photo isn't working very hard.



Have a dream but no financial freedom?

Invest and grow your money with a low-cost Intuitive Investor® account

Find Out More

Intuitive Investor®

AN OVERVIEW

PORTFOLIOS

EXPERT ADVICE

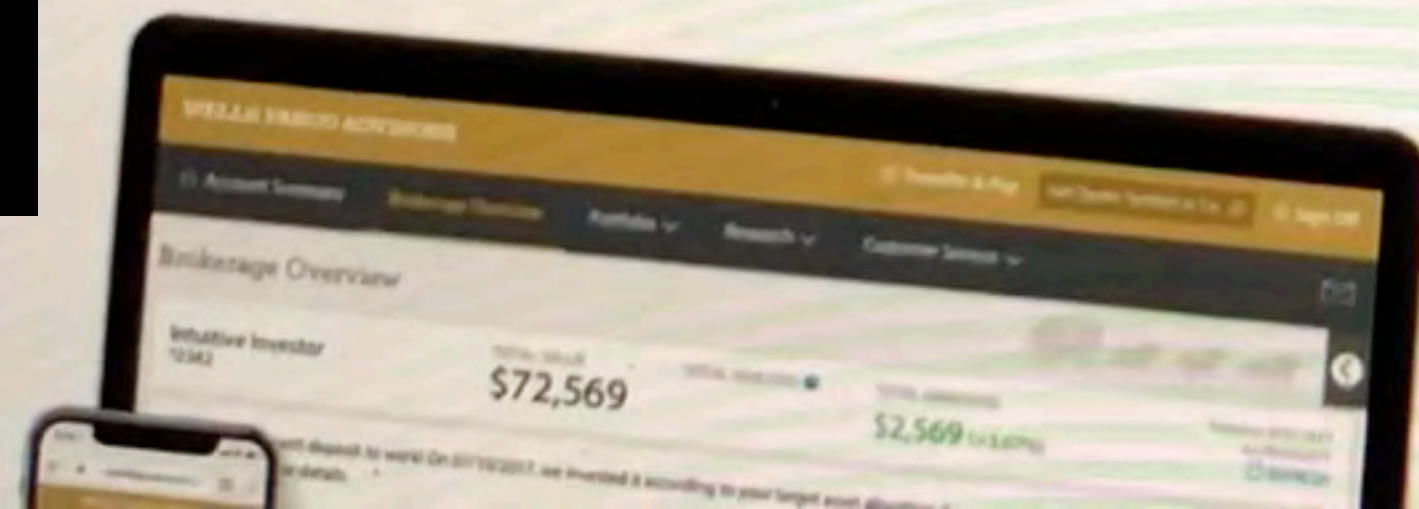
FEES

Sign On to Begin



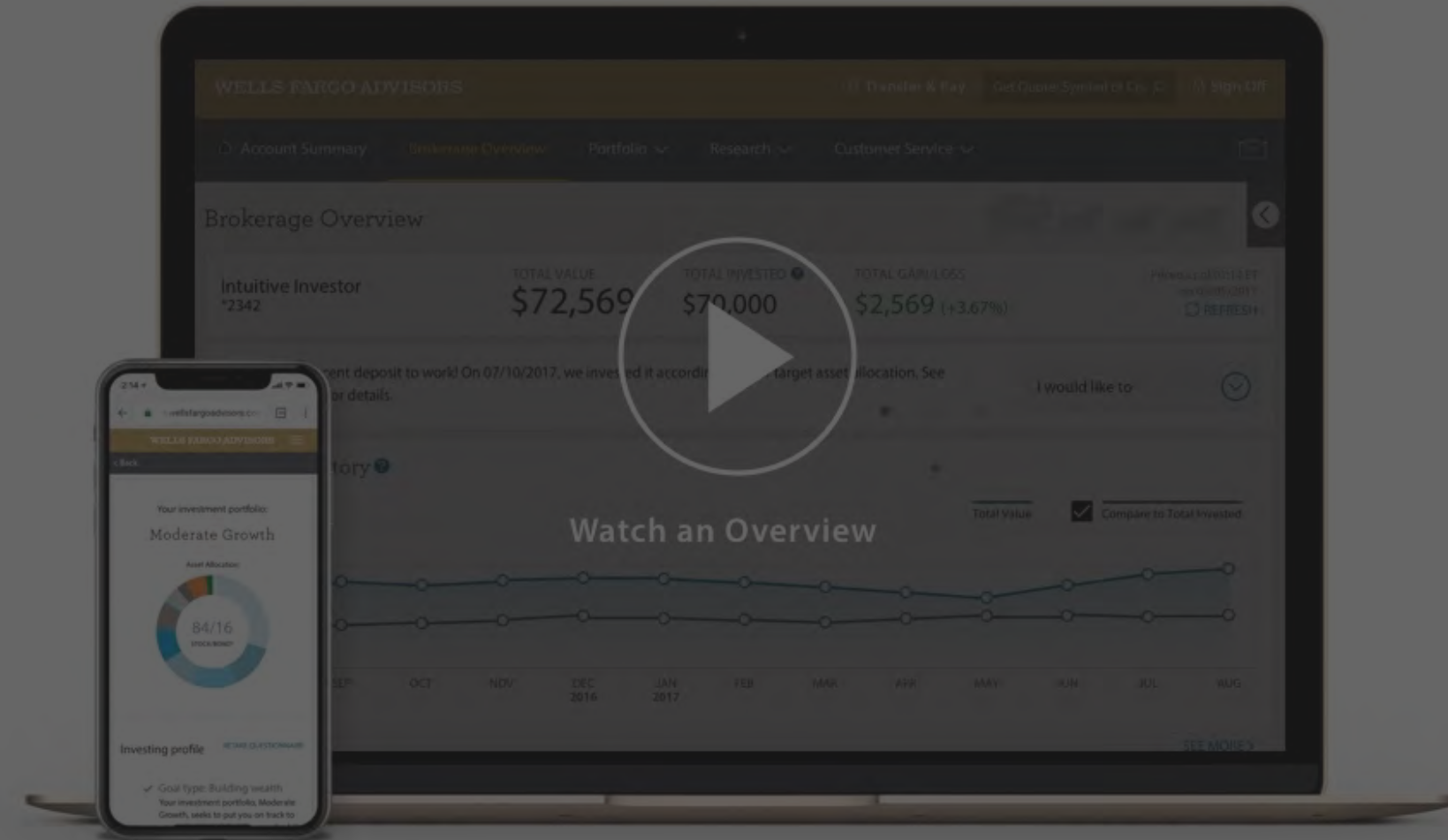
Artboard 1

Click anywhere on screen to play



ROBO-INVESTING, NOT ROCKET SCIENCE
It's simple investing with a personal touch.

Goes to sign on page



WHAT IT IS

It's simplified investing with a personal touch.

No picking stocks, trading, timing the market or rebalancing your account.

With an *Intuitive Investor*® robo-advisory account you get a diversified portfolio automatically chosen for you. Our technology balances and maintains the portfolio over time so you don't have to. And if you have questions you can talk with a licensed financial advisor.

Sign On to Begin

See How It Works

*No commitment required

AT-A-GLANCE FEATURES OF ROBO-INVESTING

Portfolios matched to you.

Day-to-day monitoring

Automatic adjusting

Online access

One low advisory fee

Access to Advisors

THE PROCESS

Anyone can get started investing in minutes.

1. Answer a few questions about your investment goals, risk tolerance and timeframe.
2. View your recommended investment portfolio based on your responses.
3. Open an online account.
4. Sign your account documents and fund your account



Sticky Secondary Nav

What users want:

To be able to quickly get to information that answers the questions they have

What we want: Users to be able to navigate natively whether that is scrolling or using traditional nav and to always have the sign on button available.

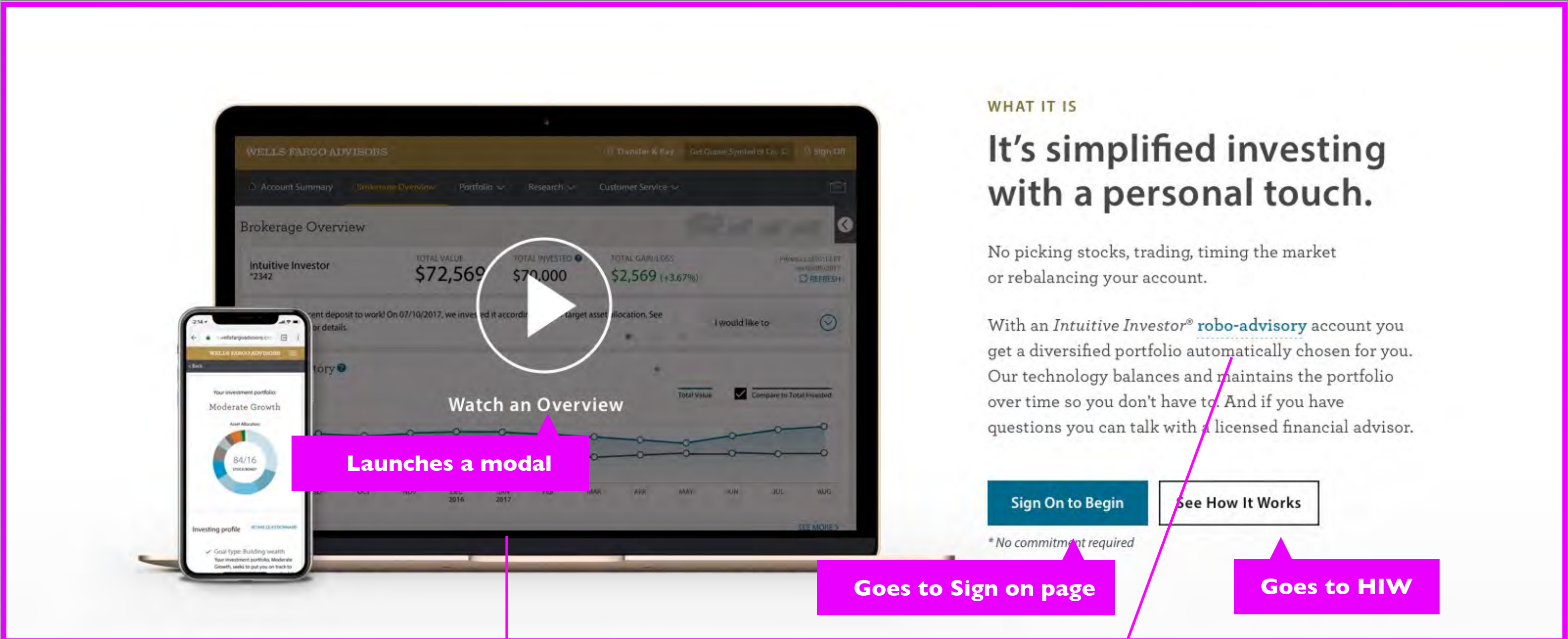
What we did:

- Created a user friendly native way to navigate where target audiences (generationally) can explore the page their way
- Ex. Millennials scroll intuitively, Boomers look for buttons to navigate natively.
- Made it more ADA friendly - screenreader will read this section and allow the user to choose what is important versus having to read the entire page to get to info.
- Created an opportunity where we could potentially get more targeted analytics that help us identify which sections of the page viewed the most

Functionality:

Nav is located below the advertising section - once you scroll past that it sticks to the top of the screen... if you scroll up mega nav is still available

hint: If you scroll back and forth between this page and the previous one you can somewhat see how it could lock to the top of the screen.



Overview/What it is

What users want:

To be able to quickly understand what Intuitive Investor is and what it does.

What we want: To connect the term robo-advisor and the concept of digital advising to Intuitive Investor.

What we did:

- Introduced the term robo-advisor & connected it to II.
- Started the body copy with a subtle differentiating feature - No trading.
- Gave additional context around robo without being overwhelming by using tooltips.
- Moved “ How It works video” to prime placement (video tests well).
- Added a quick view (see next page).

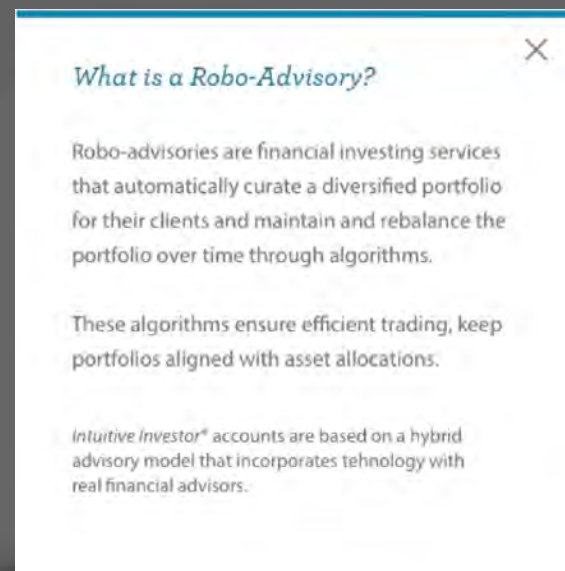
Across all sections:

- Reworked copy to be easily readable at a sixth grade level using Hemingway App.
- Created explanatory headlines .

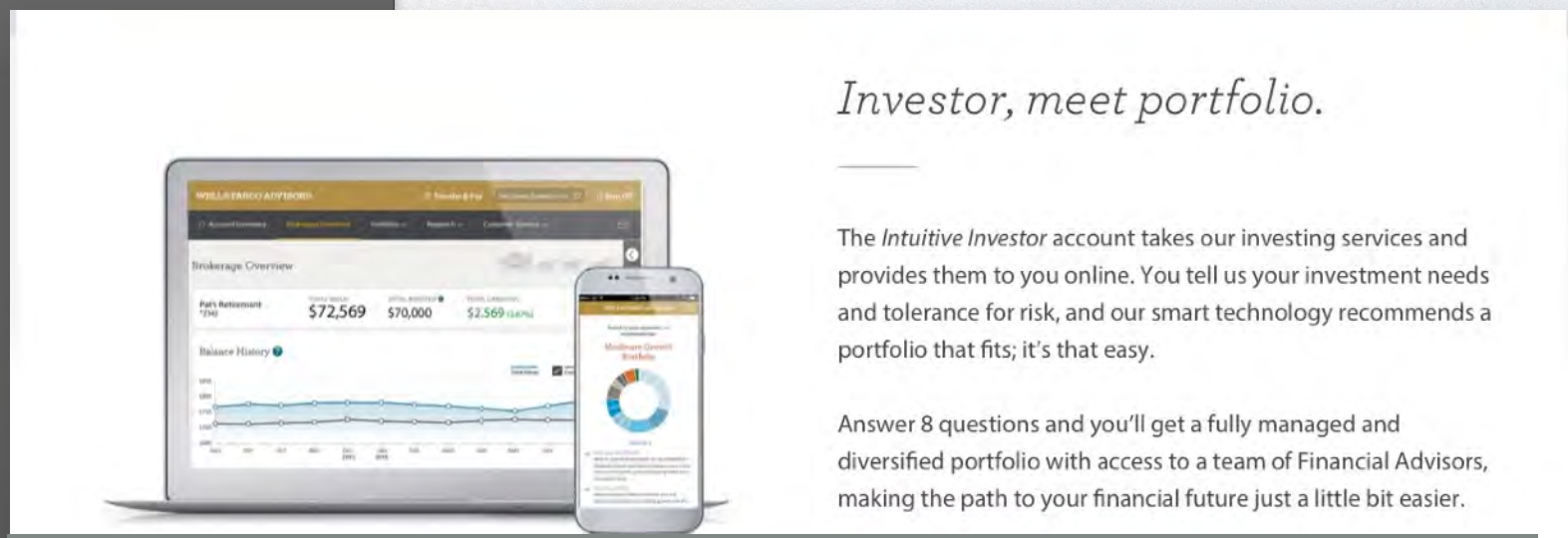


AT-A-GLANCE FEATURES OF ROBO-INVESTING

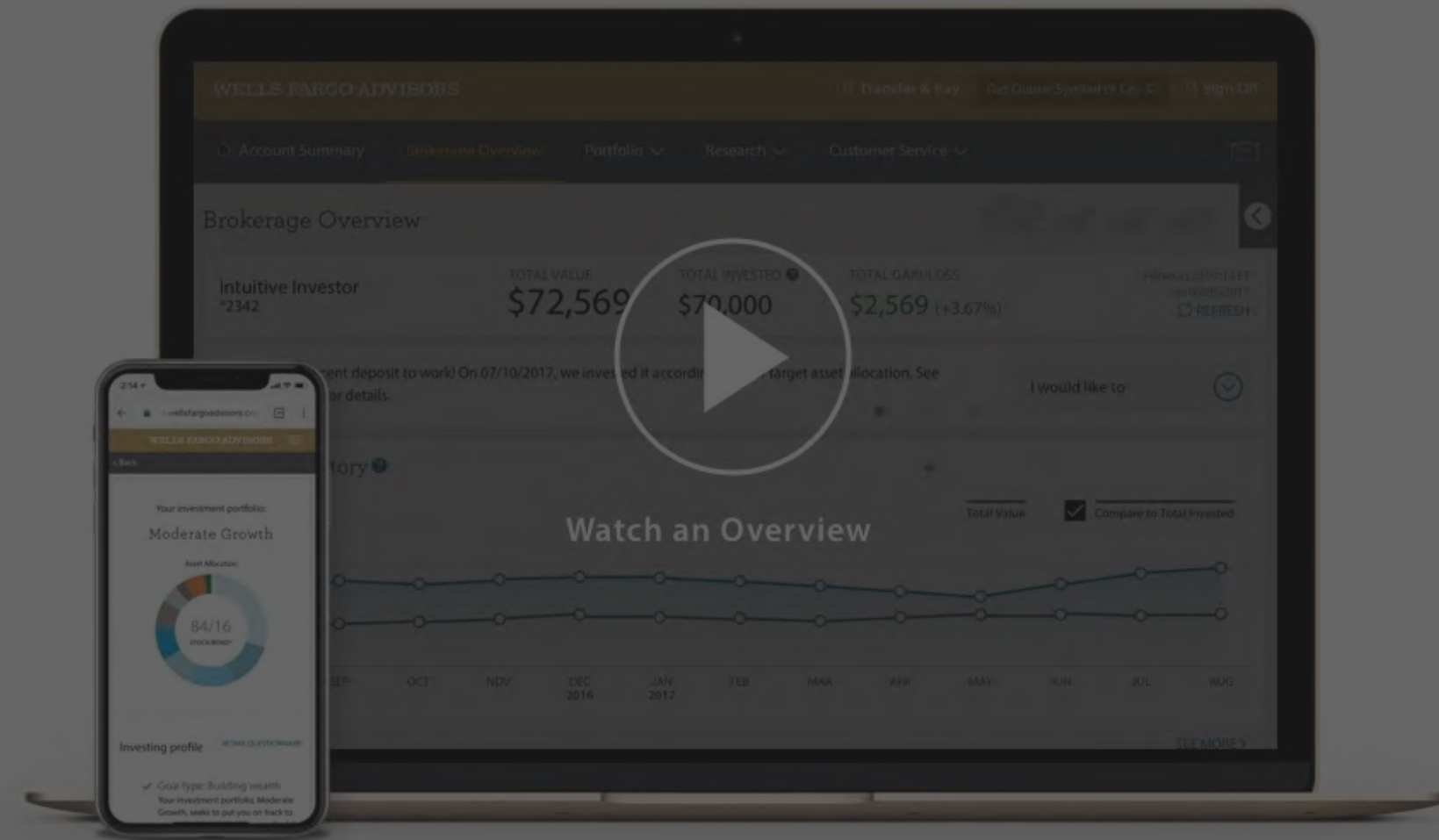
- Automatic adjusting
- Online access
- One low advisory fee
- Access to Advisors



1. Answer a few questions about your investment goals, risk tolerance and timeframe.
2. View your recommended investment portfolio based on your responses.
3. Open an online account.
4. Sign your account documents and fund your account



Original : Headline is friendly but doesn't say much - paragraph is decent we just make it more blunt.



WHAT IT IS

It's simplified investing with a personal touch.

No picking stocks, trading, timing the market or rebalancing your account.

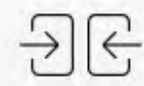
With an *Intuitive Investor*® robo-advisory account you get a diversified portfolio automatically chosen for you. Our technology balances and maintains the portfolio over time so you don't have to. And if you have questions you can talk with a licensed financial advisor.

Sign On to Begin

See How It Works

*No commitment required

AT-A-GLANCE FEATURES OF ROBO-INVESTING



Portfolios matched to you.



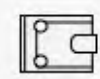
Day-to-day monitoring



Automatic adjusting



Online access



One low advisory fee



Access to Advisors

← New! At-A-Glance Section!

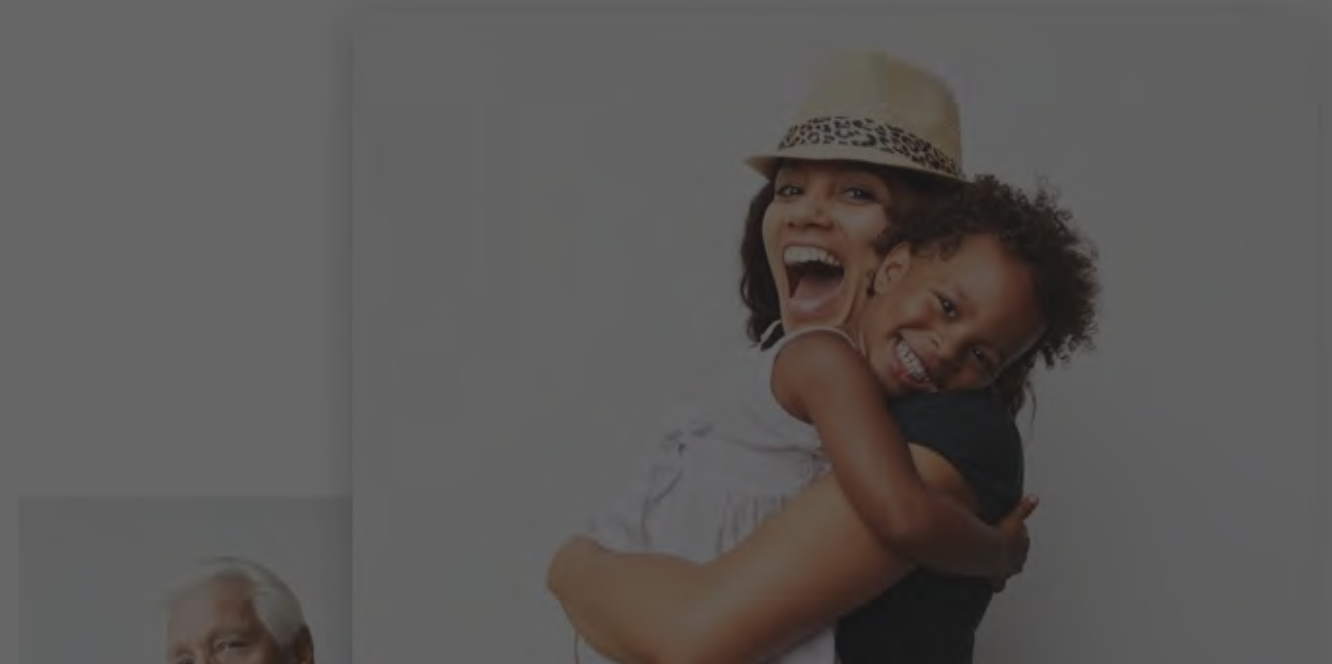
What users want: a quick overview of what a robo was to clarify.

What we want: was for them to understand even if they weren't readers.

THE PROCESS

Anyone can get started investing in minutes.

1. Answer a few questions about your investment goals, **risk tolerance** and timeframe.
2. View your recommended investment portfolio based on your responses.
3. Open an online **account**.
4. Sign your account documents and fund your account



The Process

What users want:

To feel like this product could work for someone like them. And to understand step by step what that means.

What we want: To make how it works clear and set expectations (some of which includes we can accommodate you).

What we did:

- Sowed seeds of approachability by showing a collage of people of multiple age ranges, sexes, races and family situations. Testing shows us people react to people like them so there is some appealing to tribalism here.
- Moved the step-by-step from HIW to replace the over simplified three part how it works that was too sparse to resonate.
- Added tooltips for additional information (i.e. types of accounts) to answer more user questions rather than make them dig in FAQ.
- Added a note about keeping you informed of progress.
- Added a closing statement letting them know they can call if they need help.
- Used a headline with a proven conversion technique of qualifying time.

**this section will load in with a subtle micro animation that layers the images.*

THE PROCESS

Anyone can get started investing in minutes.

1. Answer a few questions about your investment goals, [risk tolerance](#) and timeframe.
2. View your recommended investment portfolio based on your responses.
3. Open an online [account](#).
4. Sign your account documents and fund your account with [\\$10,000](#) within 90 days.

We take it from there. Let the built-in technology keep your account on track and you informed about progress.

Have questions or need help?
Call an advisor at 1-855-283-5567.

Sign On to Begin

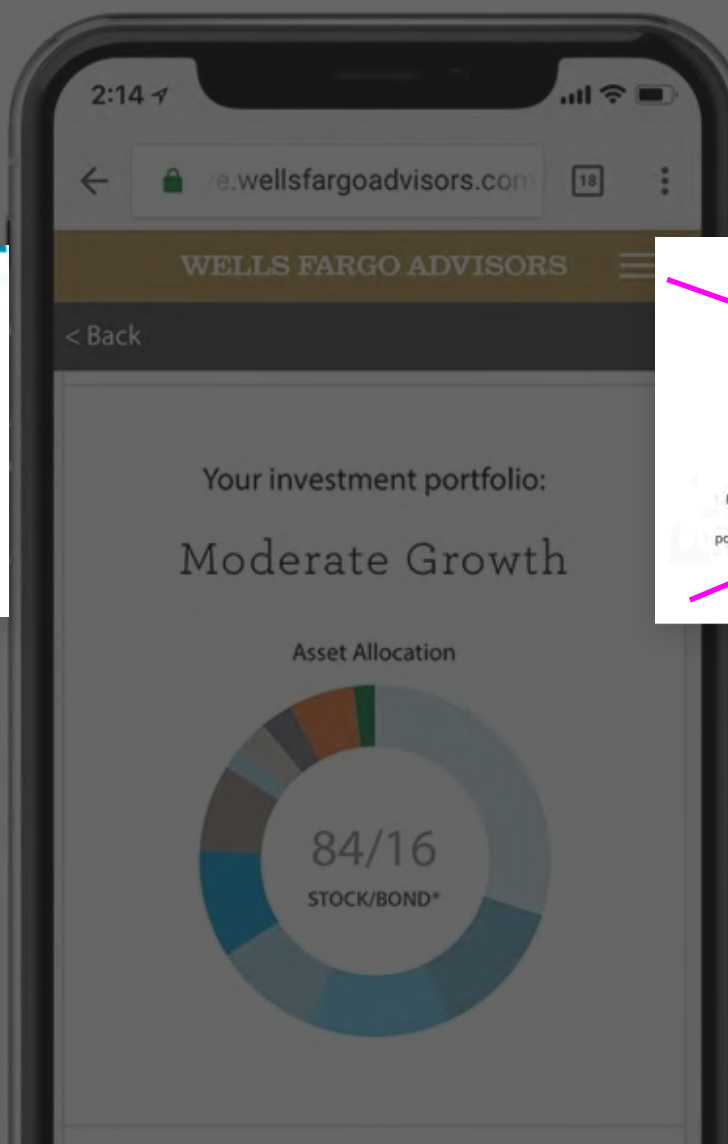
* No commitment required



Goes to Sign on page

What kind of account can I open?

You can choose from a standard brokerage account (individual or joint), Roth IRA, Traditional IRA, or SEP IRA.



How it works



Intelligent technology simplifies your investing

Opening an *Intuitive Investor* account takes just 4 steps:

1. Answer 8 easy questions about your investment goal, time frame, and risk tolerance.
2. View your recommended investment portfolio right away.
3. Open an account (choose a standard brokerage account—individual or joint—or a Roth IRA, Traditional IRA, or SEP IRA).

Original : Headline is good but doesn't connect to the step-by-step as directly - neither does the visual. Also there's some extra info in the steps so they were streamlined.



THE TECHNOLOGY

Automation makes everything easier.

Daily monitoring & automatic rebalancing

Sophisticated algorithms **monitor** your account allocations daily and trigger rebalancing to ensure they are always on track.

Auto-depositing

Set up recurring transfers to contribute to your account automatically.

Automatic dividend reinvesting

Multiply your money over time with compound interest and **automatic dividend reinvesting**.

Tax efficiency

Automatic **tax-loss harvesting** monitors for potential opportunities to reduce your tax liability.

Technology

What users want:

A straightforward answer to the specifics of the tech versus just saying “tech-driven”. This felt too ambiguous to users.

What we want: To connect the technology features to time saving and ease of use for the user.

What we did:

- Broke out a separate section to cover this in a more “scannable” way.
- Put all of the major tech elements right out in front so they don’t have to hunt.
- Removed any ambiguous terminology - if it’s an algorithm we called it that.
- Grouped content into small nuggets of information.

THE TECHNOLOGY

Intelligent investing

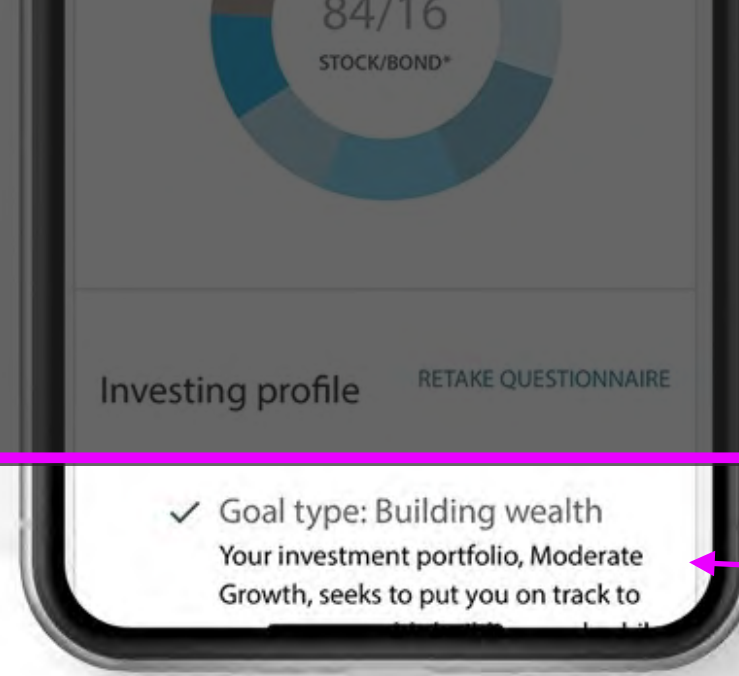
From the second you open an account, our technology kicks into gear, investing deposited funds into your recommended portfolio. With day-to-day monitoring, we can proactively rebalance your portfolio, making sure that as the market



Adjust

We’ll take it from here, monitoring your portfolio daily to help keep it on track.

Original : Two separate sections with either too much, too little or non-broken out features of tech that are hard to read and feel either tedious or oversimplified.



Auto-depositing

Set up recurring transfers to contribute to your account automatically.

monitors for potential opportunities to reduce your tax liability.

THE PORTFOLIOS

Diversified to help reduce risk.

Each *Intuitive Investor*® portfolio invests your money into a variety of **ETFs**. This ensures no matter what the market does, your eggs aren't in one basket.

< Explore the chart to see how your assets change based on risk.

Conservative (more bonds) **Moderate** (balanced mix) **Growth** (more stocks)

[More about Portfolios](#)

Depending on screen size you May see a connection with the donut above.

Portfolio section

What Users Want:

To understand what the portfolios are and how they are diversified on a top level.

What we want: To reassure them we have a portfolio for them and that our portfolios are targeted and professional and will work for them.

What we did:

- Eliminated the donut as testing showed users don't understand it.
- Moved to a bar chart that is clearly labeled.
- Added helpful tags to buttons to help educate about conservative vs. growth portfolio.
- Eliminated reference to 9 portfolios as it added confusion (why only 9, can't be customized then. etc.).
- Added a "backed by experts section for validity (tested great).

Backed by Experts

Portfolios are curated by licensed advisors at the [Wells Fargo Investment Institute](#). They are:

Modeled on the Nobel Prize winning [modern portfolio theory](#).

Supported by a network of licensed financial advisors across the country.

Part of the 3rd largest brokerage in the U.S.

THE PORTFOLIOS

Want an expert-designed portfolio? We built 9.

Example: Moderate Growth & Income

CONSERVATIVE AGGRESSIVE

Your answers to our 8 questions tell us things like how comfortable you are with risk and how long you want to invest, allowing our automated investing the portfolio that fits best. This means only a diversified portfolio, but the

[See Our Portfolios](#)

Original : Hard to understand pie chart with not enough info to understand. Opens up issues by introducing the 9 portfolios too soon and people get distracted by the number

THE FEES

Upfront pricing with no hidden fees.

With a minimum investment of \$10,000, your estimated quarterly **advisory fee** could be as low as \$12.50.

[Learn more about pricing \(PDF\) >](#)



0.50% advisory fee* + fund related expenses

No commission, transaction or trading fees.

FUNDING

Flexible funding options to work with what you have.

- Transfer from any bank or brokerage
- Fund from multiple accounts at one time
- Move from Cash, Checking or Savings
- Rollover from an existing brokerage, 401K or IRA



\$10,000 minimum
to get started

THE COST

Straightforward pricing



\$10,000 minimum to
get started



0.50% annual
advisory fee



No transaction or
commission fees

Cost/Fees

What users want:

To know what it's gonna cost and if there are requirements.

What we want: To remove any hesitancy or hurdle that can learning of the account minimum can create and ensure that the advisory fee is clear not intimidating.

What we did:

- Created a clear visual hierarchy where the advisory fee is center stage with "upfront pricing with no hidden fees as a supporting element (and connects to the fee)
- Added a funding section to answer users questions about funding options and make it's apparent the 10K minimum does not have to come from one source. (* Testing showed a reduced # of participants questioning the minimum when funding was showed in tandem.)
- Created the idea we will work with you with what you have which is approachable and reassuring.
- Broke out the 10K minimum with a graphic and in a different panel from advisory fees/transaction fees so that it was impossible to miss.
- Created a link to this area from the Navigation so that it could be immediately accessible for those users that care most about fees and want to see them first.

Original : Equal hierarchy gives no clear importance - 10K minimum isn't pricing either. All the same icons again makes this easy to scan over.

what you have.

• Rollover from an existing brokerage, 401K or IRA

to get started



THE ADVISORS

One-on-one expert advice at no additional cost.

If you have questions call - a team of licensed Financial Advisors is ready to answers things like:

- What happens if my financial situation changes?
- How is my account performing?
- What happens to my portfolio in a volatile market?

Speak to an Advisor
1-855-283-5567
Mon-Fri: 8am - 8pm ET.



More About Advisors

Goes to advisors section of HIW

Advisors

What users want:

To know they can talk to a real person, ask questions and they are in the US.

What we want: To make sure they know it's a team and give them an idea of what they can ask and that it's FREE.

What we did:

- Cut one of the questions
- Added in an icon for a quick read that advisors are US based which was a question raised in testing over and over.
- Added "licensed" for validity and the word "team" so it wasn't confusing.
- Wrote a headline that emphasized the all inclusive nature of cost.

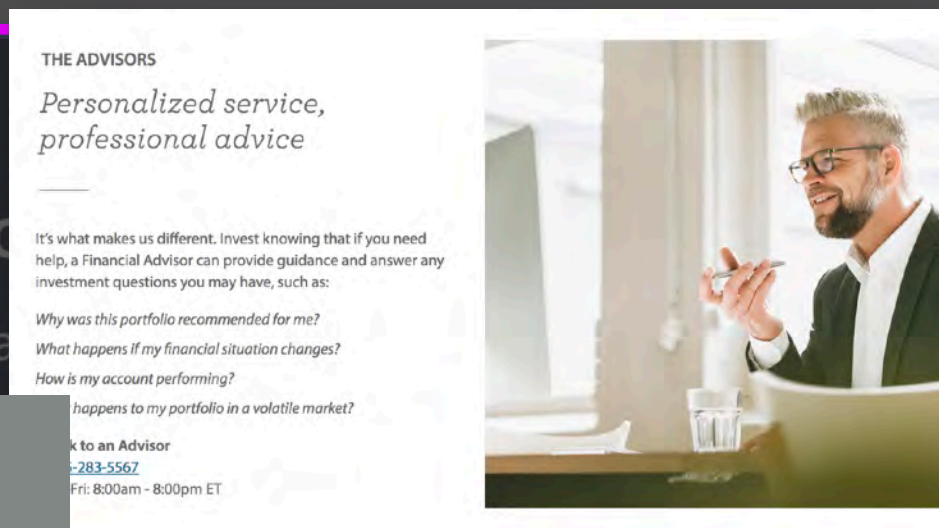


SATISFACTION GUARANTEE

If you're not happy within the first 90 days you'll get your paid 0.50% advisory fees back.

Get Started Investing To

See what an Intuitive Investor® account ca



Original : This section was ok. Removed some extra copy and got a more intimate image in place.

Satisfaction Guarantee -

- Locked up at the bottom and removed disclaimers (per sigfig).
- Added a shield icon for quicker readability.



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More About Advisors



SATISFACTION
GUARANTEE

If you're not happy within the first 90 days you'll get your paid 0.50% advisory fees back.

Get Started Investing Today.

See what an *Intuitive Investor*® account can do for you.

Sign On to Begin

How It Works

FAQs

Goes to Sign on

Goes to HIW

Goes to FAQ

Monday- Friday: 8:30 am - 9:30pm ET; Saturday: 10:30 am - 7pm ET

Need help opening a new account? Call us at 1-866-224-5708 Mon-Fri: 8:30 am – 9:30 pm ET; Sat: 10:30 am – 7 pm ET.

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Together we'll go far



← Call to action bottom

- Added a secondary call to action at the bottom.
- Reiterated the trifecta of buttons so all options including FAQ are under the users fingertips.
- Gave phone numbers etc. in case you need help.