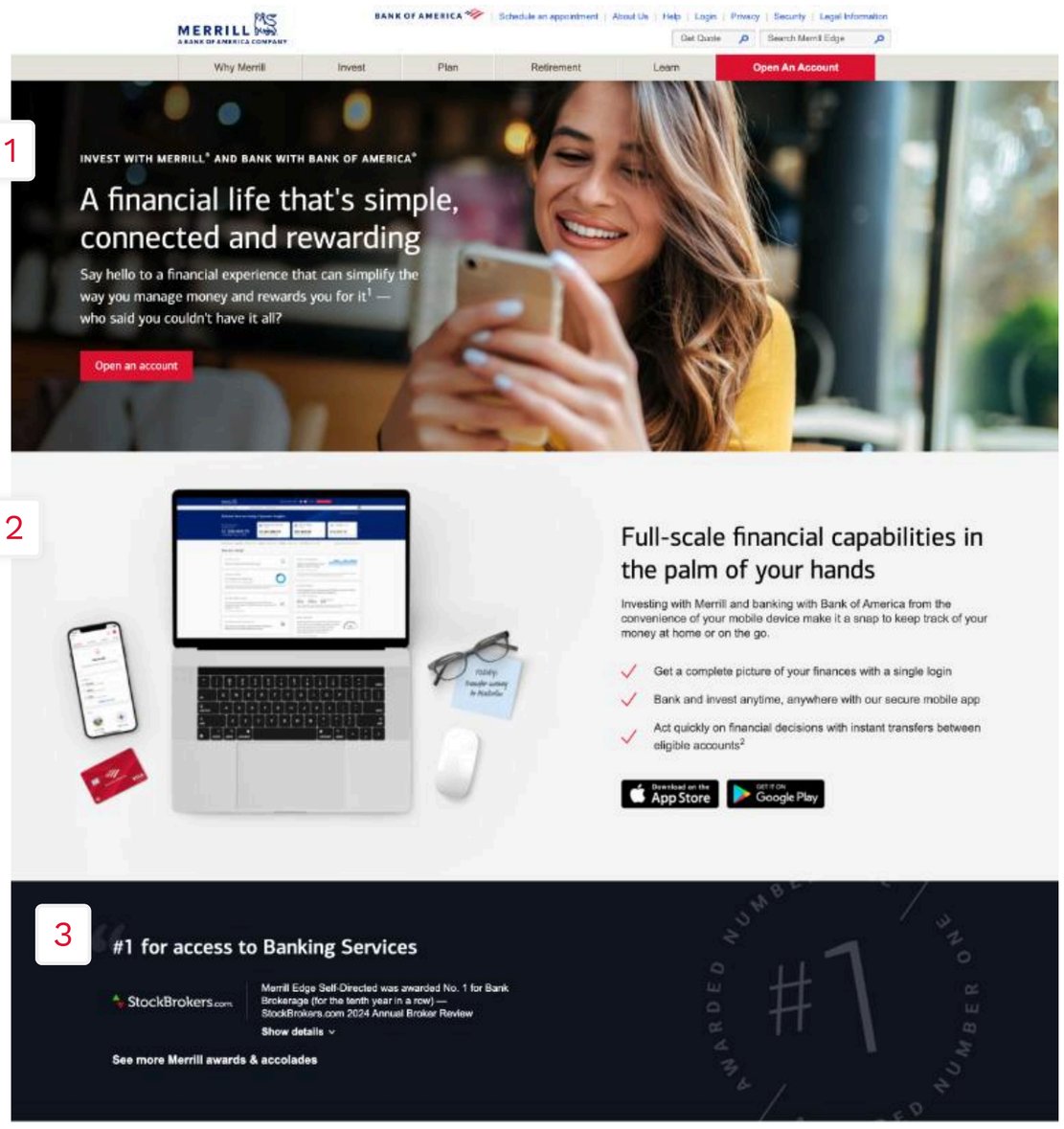
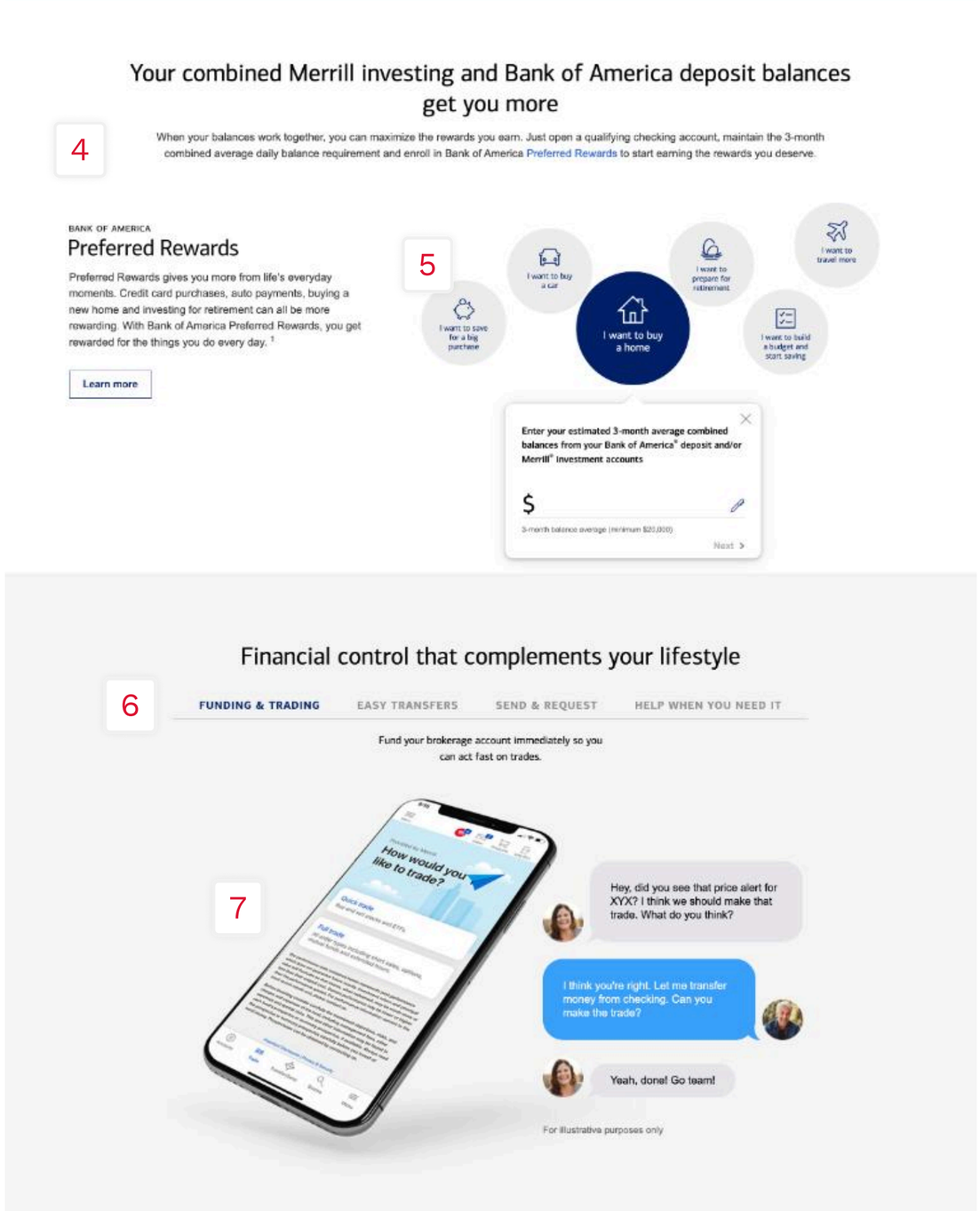
Kickoff + Audit of Live Page

- Recommended updates & enhancements





1 Optimize header copy for “Open an account” conversion

- too busy; can we move messaging somewhere further down experience?
  - this will help with OAO button conversions

2 Update img

- consider a stronger visual treatment aligned with brand aesthetics
- highlight BofA + Merrill relationship

3 Move down to support updated hierarchy

- leverage new defined accolades treatment for consistency

4 Rework copy

- combine 2 paragraphs of copy into one so this section is less text heavy and we can focus on the interaction piece
- remove repetitive copy (footer CTA section)

5 Interactive tool – highlight

- make the experience more user-centric by leaning into “I want to…” language
- explore alternative treatments to improve conversion and encourage interaction
- reevaluate the flow: if all inputs are fixed, can this be a static module instead?

6 Update component treatment

7 Update look and feel

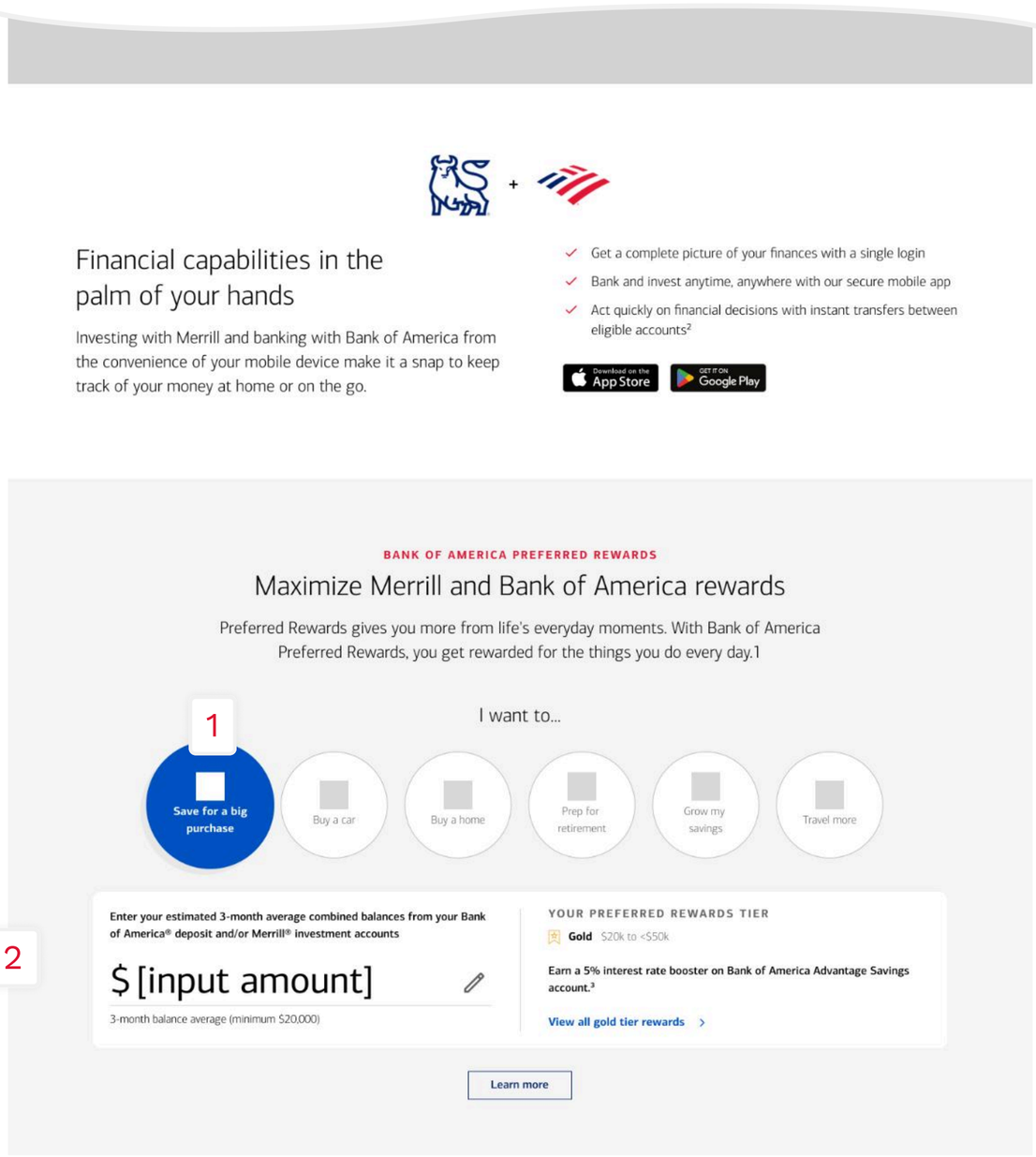
- pull out of device
- keep texting feel/narrative

8 Consolidate

- currently occupies too much space—explore more efficient use of layout
- consider a stronger visual treatment aligned with brand aesthetics

Design Iterations + Stakeholder Feedback

- Recommended updates & enhancements



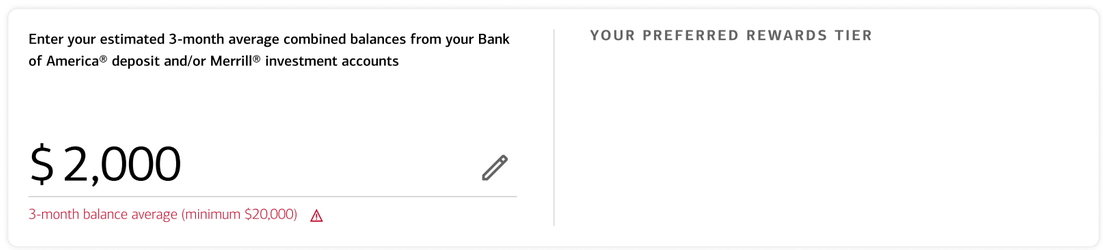
1 **By default “save for a big purchase” circle is “active” on page load; input + results box is also displayed by default**

this is intended to keep the page from jumping due to growing/ shrinking section height as a selection/input is made

- use existing ‘transition: all .5s ease-in-out’ from live page for circle animation as it grows on hover/focus/selection

2 **Update UI pattern, eliminate friction**

- build in logic that doesn’t requite users to hit “next” button after inputting $ amount (current functionality)
- if valid amount is inputted results populate automatically
- include logic that throws an error if “3-month balance average (minimum $20,000)” is not met–satisfy WCAG 2.2



Final Review & Approval – Webpage

- Alternative views + annotations to be included for all breakpoints
- Meeting w/ dev to review intended behavior



