FutureFunds

About | Contact | Blog

WHO WE ARE

Aiming to Bring Everyone to Financial Independence

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LET'S CHAT

WHAT WE DO

Offering Financial Planning Services for Every Stage of Life

FINANCIAL HEALTH ASSESSMENT	FINANCIAL PLANNING	RETIREMENT PLANNING	PORTFOLIO MANAGEMENT
Analyze your current financial situation with a personalized evaluation. Identify areas for improvement to strengthen your financial foundation. Gain clarity with actionable insights tailored to your goals.	Create a step-by-step roadmap to achieve short- and long-term goals. Optimize your budget, savings, and investments to maximize potential. Adjust strategies as life changes to keep you on track.	Plan for a secure future with a customized retirement strategy. Maximize contributions and minimize taxes for long-term savings. Ensure a sustainable income stream to support your lifestyle.	Build a diversified portfolio aligned with your risk tolerance. Monitor and adjust investments to meet your financial objectives. Access expert guidance to navigate market changes confidently.

HOW CAN WE HELP

See How Our Financial Calculator Can Help You & Your Savings Goals

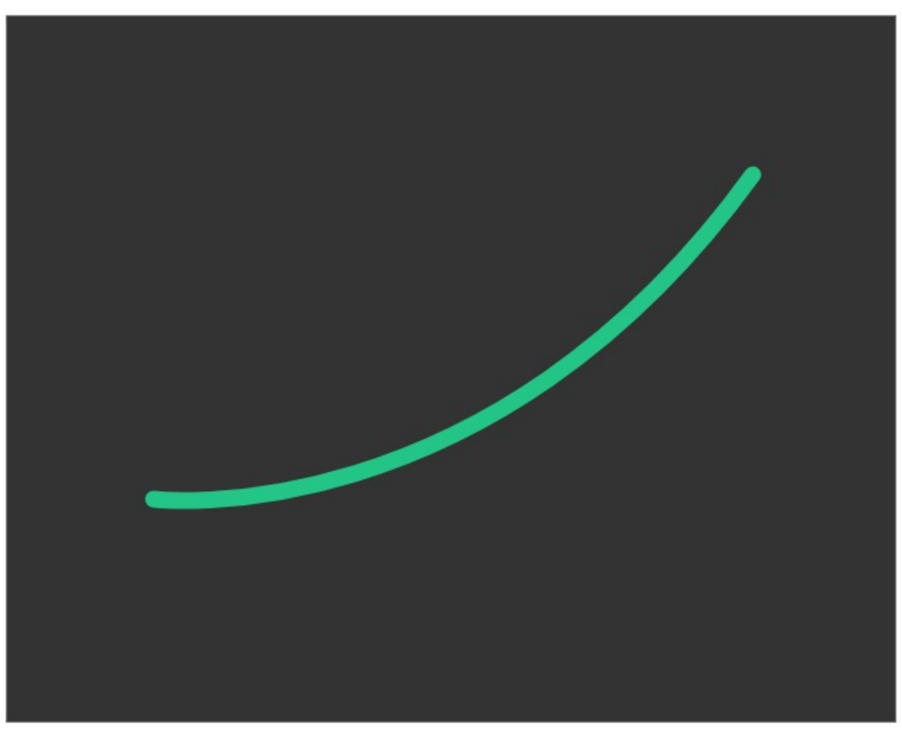
Current savings account

Current retirement savings amount

Annual salary

When do you want to retire?

CALCULATE



DOWNLOAD RESULTS

LET'S CHAT

LET'S CHAT

Let's Schedule Your Free Consultation

Name

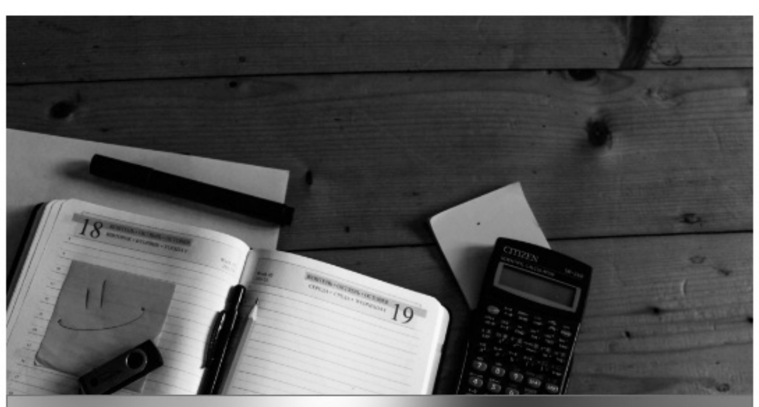
Phone

Email

LET'S CHAT

WHAT WE'VE BEEN TALKING ABOUT LATELY

FutureFunds Blog & Financial Resources



Blog 1

Blog 2

Blog 3

Blog 4

WHAT THEY ARE SAYING ABOUT US

Client Testimonials & Reviews

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SCHEDULE YOUR FREE CONSULTATION

FutureFunds

About FutureFunds
Meet the Team
Careers

Log In
My Account
Tax Documents
Contact My Rep

Financial Calculator
Financial Hub
Blogs
In the News

Schedule Now
Contact Us

Stay Connected

FutureFunds

Applying UX & UI Principles

Client Brief: Site Objectives & Requests

Client Objective

FutureFunds aims to strengthen their online presence and better connect with their target audience . The page will serve as a gateway for young professionals to discover the benefits of financial planning with FutureFunds.

Requested Features

1. Service Offerings
2. Financial Calculator
3. Appointment Scheduling
4. Recent Blog Posts
5. Testimonials

Wireframe Review - UX

1. User-Centricity: Overwhelming content, lack of logical flow.
2. Consistency: Inconsistent subheaders and button labels.
3. Hierarchy: Poor content prioritization, unclear structure.
4. Context: Distracting forms and reviews appearing too early.
5. Efficiency: Difficult navigation and lack of clear CTAs.
6. Cognitive Load: Excessive on-page content; confusing layout.

Wireframe Review - UI

- Issues:
  - Lack of spacing between content blocks.
  - Limited hierarchy beyond font sizes.
  - Underutilization of visual balance and contrast.
- Suggestions:
  - Consistent headers and subheaders.
  - Improved spacing for clarity.
  - Simplified forms for better usability.

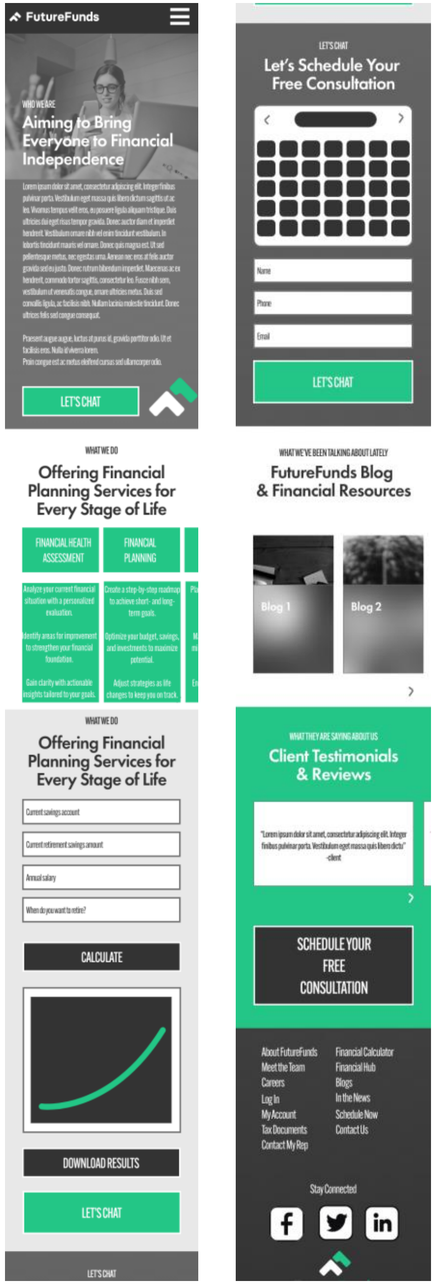
Revised – Desktop Mock-Up

The design emphasizes a clean hierarchy, with prioritized content such as 'Who We Are' and 'What We Offer.' The flow of content is more logical too, going from company info > services > tools > call to action.

Consistent spacing and labeling improve clarity, while simplified navigation ensures users can easily find key features like the financial calculator and appointment scheduler.

Revised – Mobile Mock-Up

Optimized for mobile usability, including responsive layouts and accessible navigation.



Designing for Device

Desktop View:

- Multi-column layout for more visible content.
- Larger screen size allows simultaneous visibility of sections.
- Horizontal navigation is intuitive.
- Features like calculators and blogs are fully visible.
- Reduced need for scrolling.

Mobile View:

- Single-column layout for vertical scrolling.
- Content is stacked or scrollable for thumb-friendly navigation.
- Touch targets optimized for easy tapping.
- Reduced content density for readability and simplicity.
- Streamlined navigation to reduce frustration.

Accessibility Enhancements

Checklist:

- ❑ Alt text for images
- ❑ Keyboard navigation
- ❑ High color contrast
- ❑ Legible font sizes

Improvements from Wireframe to Mock Up

Wireframe	**Improved Mock-Up**
- Minimal visual hierarchy, making content hard to scan.	- Clear visual hierarchy: headings, subheadings, and CTA buttons are prominent.
- Cluttered layout lacking structure and alignment.	- Clean, structured layout with proper spacing and alignment for better readability.
- Limited interactivity and unclear navigation flow.	- Intuitive navigation with clearly defined buttons and interactive tools (calculator, scheduler).
- Generic color palette and inconsistent fonts.	- Consistent branding: modern color palette, fonts, and button styles for a professional look.
- Accessibility concerns: small touch targets, low contrast, and lack of alt text.	- Improved accessibility: optimized touch targets, sufficient contrast, and space for alt text descriptions.

Incorporating Feedback

User 1

- “I found the appointment scheduler at the top very confusing. I couldn’t grasp what the company was about before being prompted to schedule an appointment.”
- “The form to sign up for the appointment is excessively long. I got overwhelmed with the number of fields, and I don’t know why you need my full address to schedule an appointment online.”
- “The long list of customer reviews seemed out of place. Without understanding the company’s services, it was hard to make sense of why the reviews were the first thing I saw.”
- “The “Who We Are” section was too close to the reviews, making it difficult to focus on the company’s identity and the reviews simultaneously.”

Prototyping

- Visual Clarity: Provides a realistic representation of the design, including colors, typography, and branding.
- Focus on Aesthetics: Allows clients to assess layout, visual hierarchy, and design choices before development begins.
- Clear Communication: Bridges the gap between low-fidelity wireframes and the final product, ensuring alignment on the vision.
- Time-Efficient: Avoids premature investment in interactivity, focusing solely on visuals for initial approval.

Proposed Usability Test Plan

- Scope and Goals:
  - Evaluate scheduler, calculator, navigation, and mobile legibility.
  - Assess trustworthiness of design.
- Participants: Millennials seeking financial advice
- Resources: Testing tools, incentives, and recruitment strategies

Testing Session Overview

Welcome and Introduction: Hi [Participant], thank you for joining us today! My name is [Name], and I'll be guiding you through this session. We're conducting a usability test for FutureFunds, a financial planning website designed to help users like you achieve personal financial goals. During this session, I'll ask you to complete a few tasks and share your thoughts about your experience. Please feel free to speak openly – remember, the website, not you, is being evaluated – and your feedback is incredibly valuable and will help us improve the site. The overall session should take roughly 50 minutes.

- Consent and Disclosures: Do you consent to participate and agree to the recording of this session?
- Demographic and Screening Questions
  - What type of banking or financial services do you currently use (e.g., savings accounts, investment platforms, budgeting tools)?
  - Have you ever used financial planning tools or services, such as online calculators or meeting with an advisor? If yes, which ones?
  - How familiar are you with FutureFunds or similar financial planning platforms?
  - What are your primary financial goals right now (e.g., buying a home, paying off debt, saving for retirement)?
  - How comfortable are you using digital tools, such as apps or websites, to manage your finances?
  - What is your current employment status (e.g., full-time, part-time, student, self-employed, etc.)?

Next, I'll ask you to complete a series of tasks on the website. These tasks are designed to simulate how you might use the site in real life. Please try to complete each task to the best of your ability, and feel free to share your thoughts and any challenges you encounter along the way.

- What is your perception of FutureFunds? What words come to mind to describe the brand?
- What services does FutureFunds offer?
- Find the financial calculator
- Use the financial calculator to estimate savings
- Find the appointment scheduler
- Schedule a consultation with a financial advisor
- Navigate to the 'about us' section
- Access financial growth tips or resources
- Find FutureFunds social media links

- Overall, what were your impressions of the website?
  - How easy was it to navigate through the site and complete the tasks?
  - Was there anything about the website that you found confusing or frustrating?
  - How confident do you feel about using FutureFunds for your own financial planning?
  - Is there anything you would suggest improving or adding to the website?

Closing Instructions: Thank you so much for your time and valuable feedback today! Your insights will help us improve the FutureFunds site.

Importance of Usability Testing

Benefits:

- Identifies pain points early.
- Validates improvements.
- Aligns with user-centered design principles.

Mitigating Bias is also important in usability testing.

- Diverse participant recruitment.
- Neutral task instructions.
- Iterative testing to validate findings.

Next Steps

Key Points to Remember in Future Projects:

- Start with a human-centric design view. Iterative process ensures alignment with user needs
- Prioritize clarity and navigation
- Test designs with real users regularly
- Refine content hierarchy and accessibility

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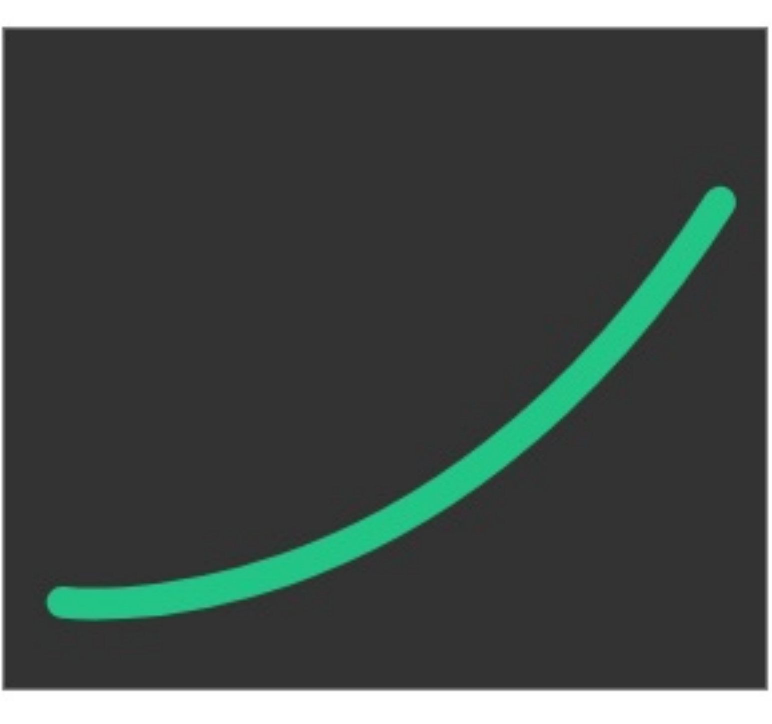

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