UX EXPERIENCE

FIND AN ADVISOR

BY

KARINA FRID

MARCH 2019

FIDELITY INVESTMENTS

PROBLEM STATEMENT

As a client I want an advocate to help me ensure that my financial plan is customized to meet my family's unique needs. I want to build a financial plan, identify strategies to improve that plan, and keep in touch on an annual basis to review or update my situation as needed. I want to have a personalized plan for my unique financial goals

ROOT CAUSES

Clients don't know that there are a variety of advisors with different backgrounds, experience and profiles that they can choose so they can feel that are their financial needs will be covered. The current experience is not good, having as a consequence a lot of uncovered clients.

HYPOTHESIS

We believe that by providing clients an opportunity to choose their advisor, someone with experience in the areas that they need and that has worked with clients with similar goals will make them feel more comfortable having as a consequence a strong client-advisor relationship.

We believe that giving our clients ongoing guidance will make them feel more secure about their future.

TARGET

Currently only 36% of Premium Clients are in a engage relationship with an advisor, with the enhancements we are currently doing we believe we can reach 50% by the end of 2019.

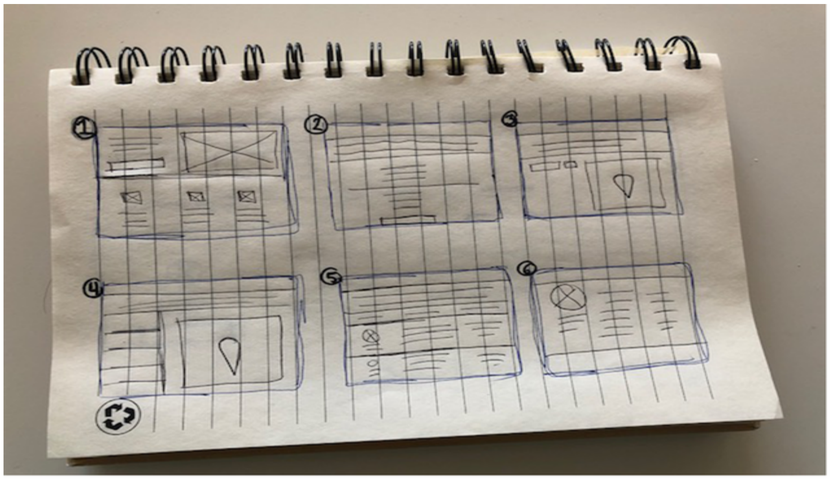
OUR COSTUMER

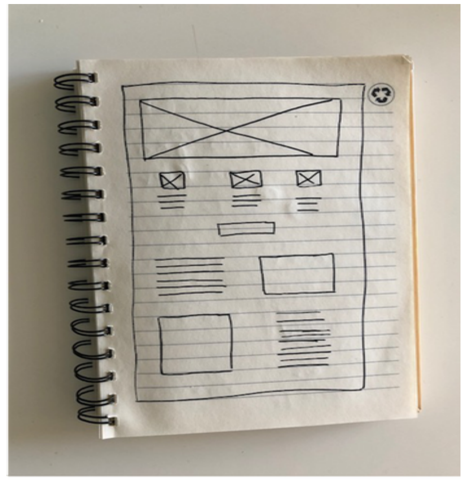
Sally, a 60 year old woman, starts to envision life beyond her current day/to/day work, she wonders if she’s as prepared as she needs to be. Sally and her husband Ben work together to make sure the money they’ve saved will allow them to take care of the things and people they need to, while living the retirement they imagined.

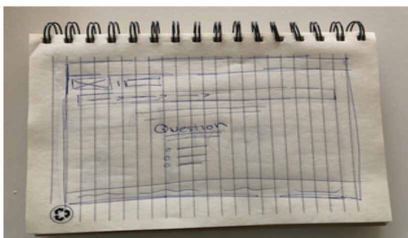
OPPORTUNITY TO SUPPORT THE MOST CHALLENGING MILESTONES

- Preparing for potential detailers to my retirement income.
- Determining specific $ amount needed to retire
- Estimating required living expenses in retirement
- Caring for aging
- Losing job
- Starting a new business
- Deciding to retire

SKETCHES



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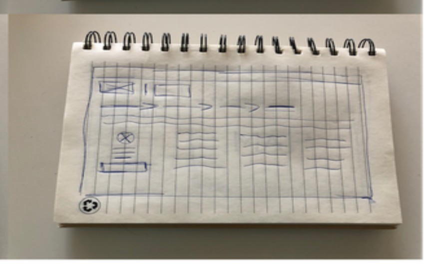
MAP

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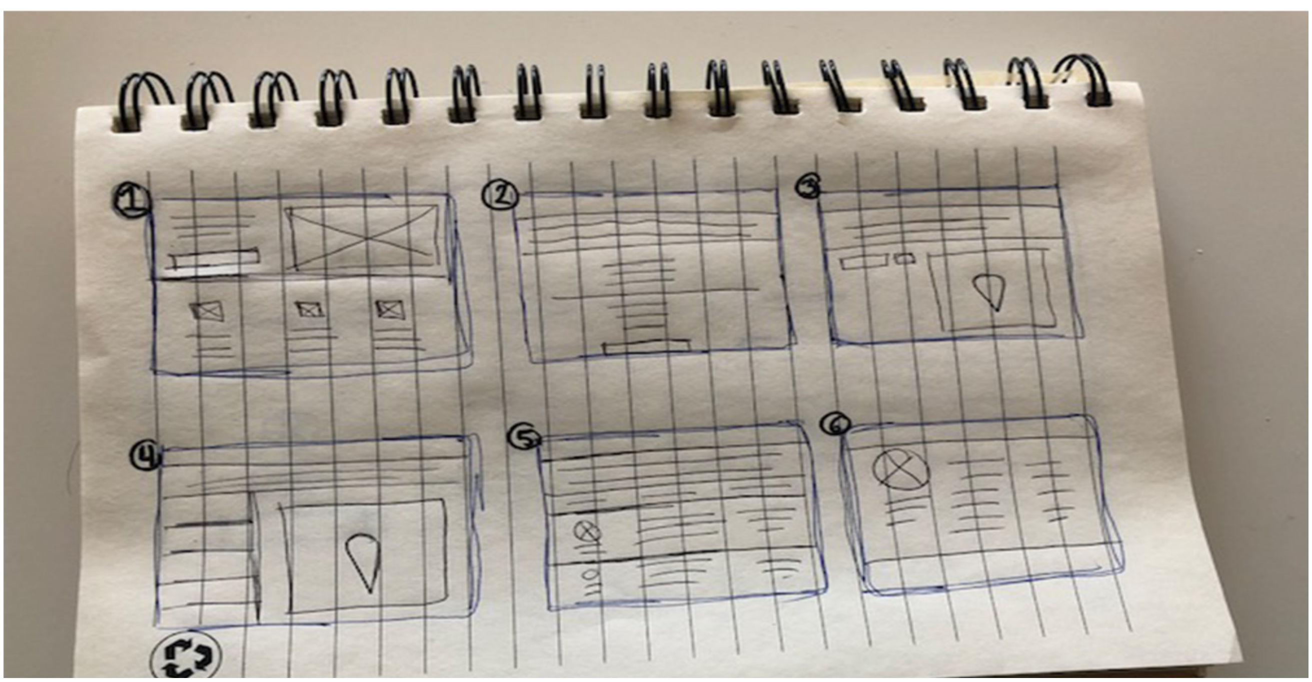

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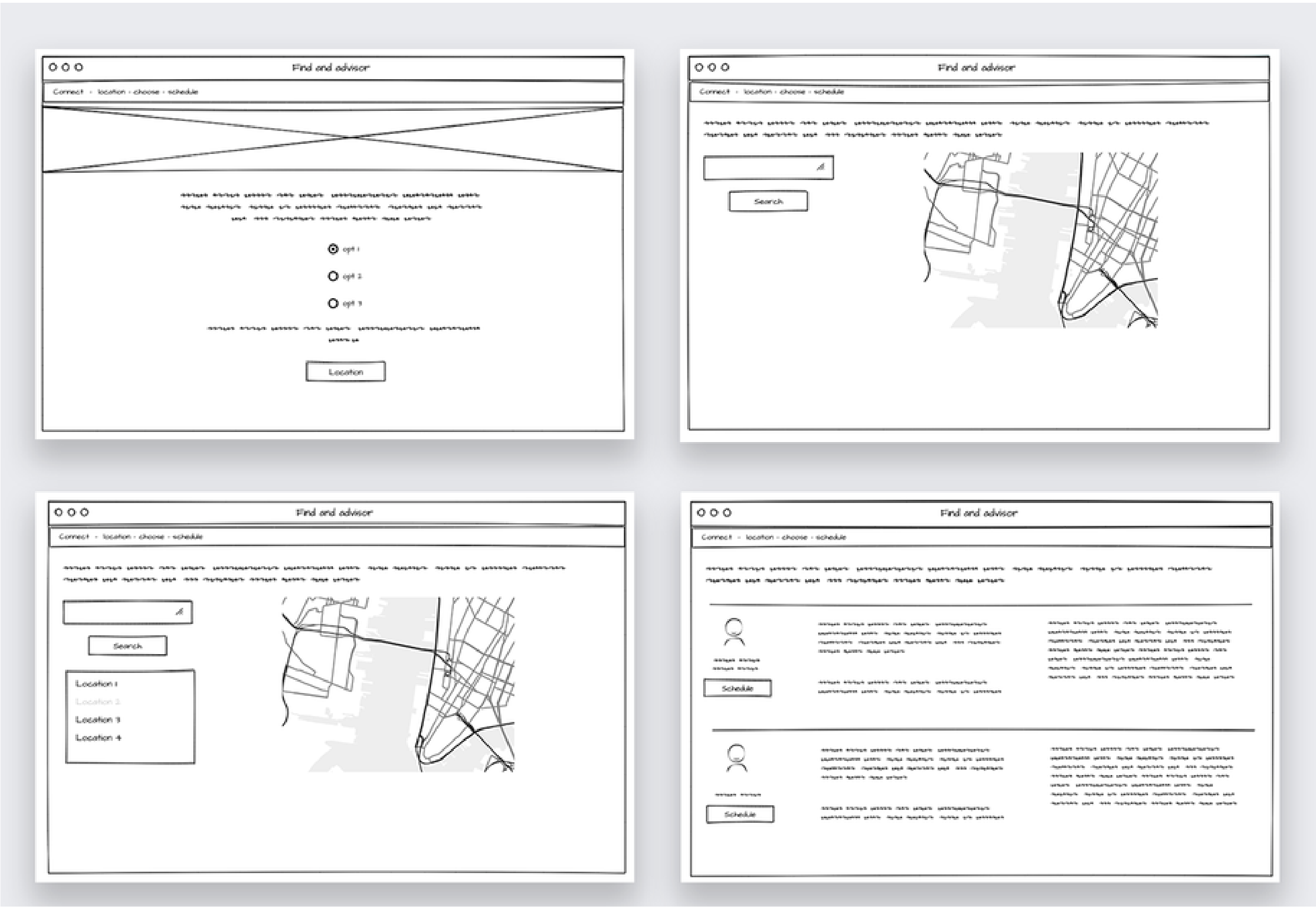
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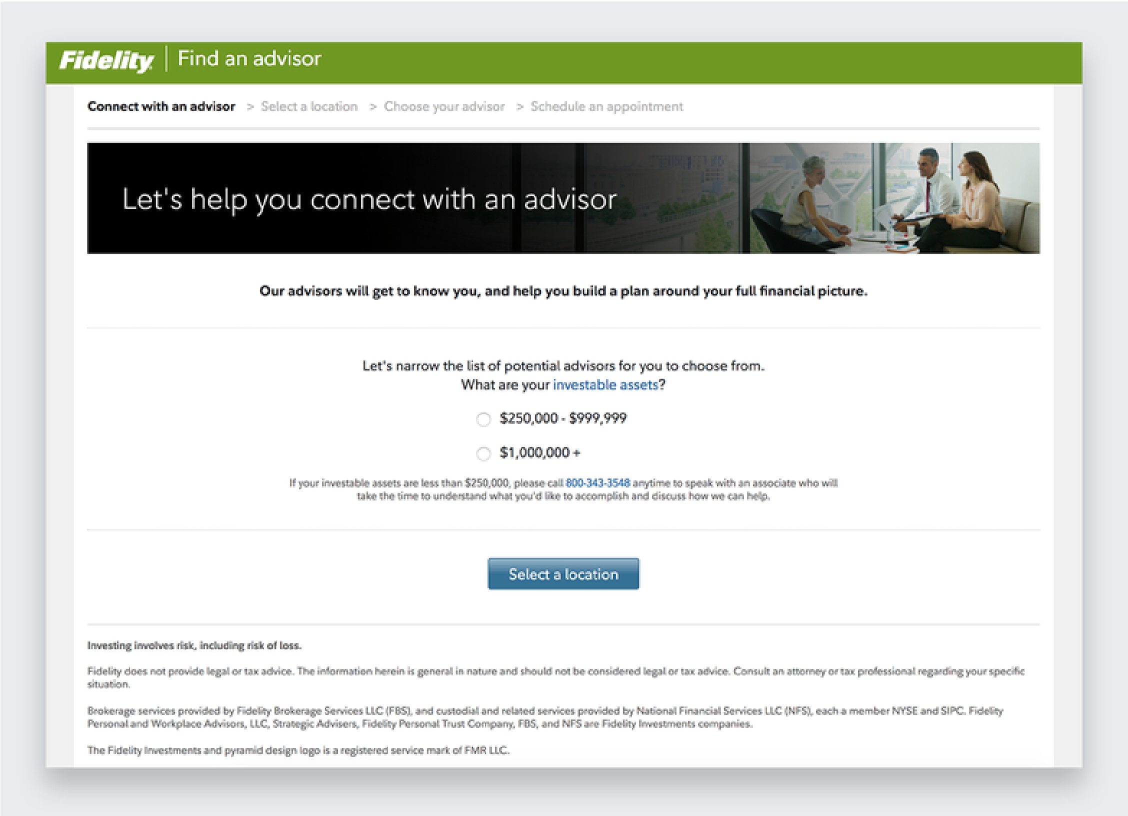
HIGH - FID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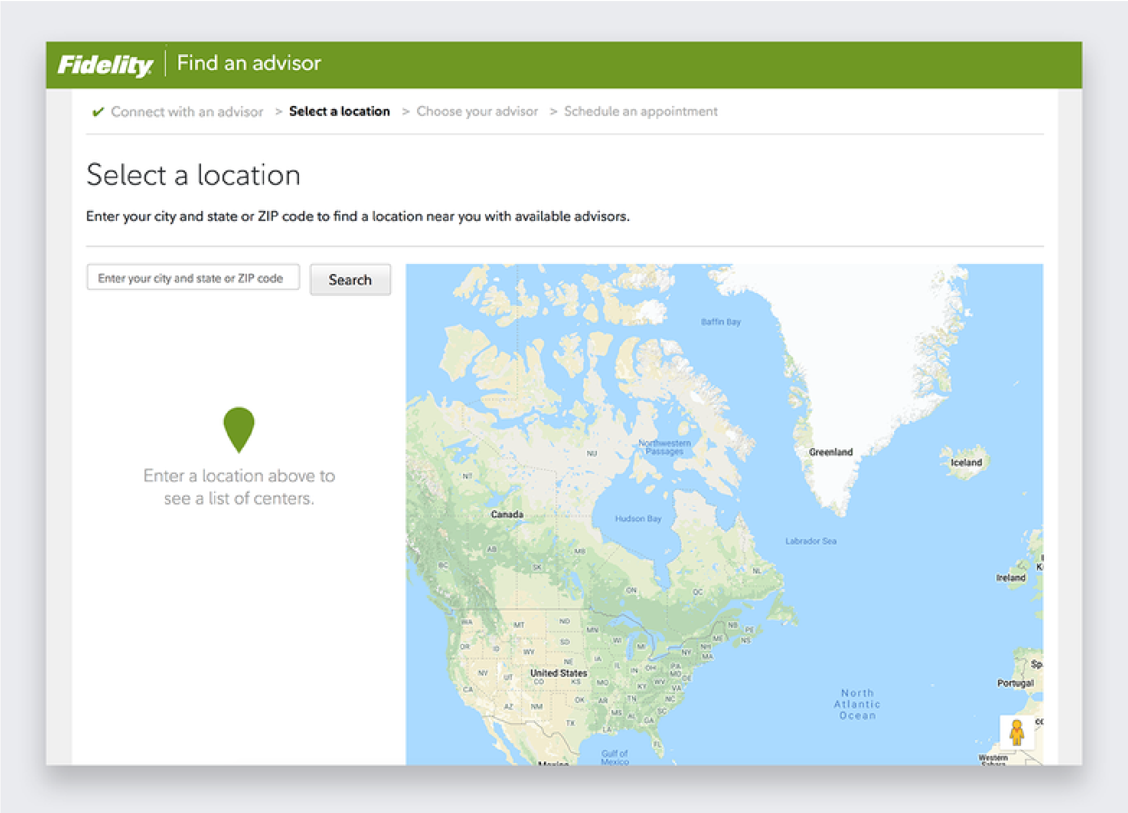
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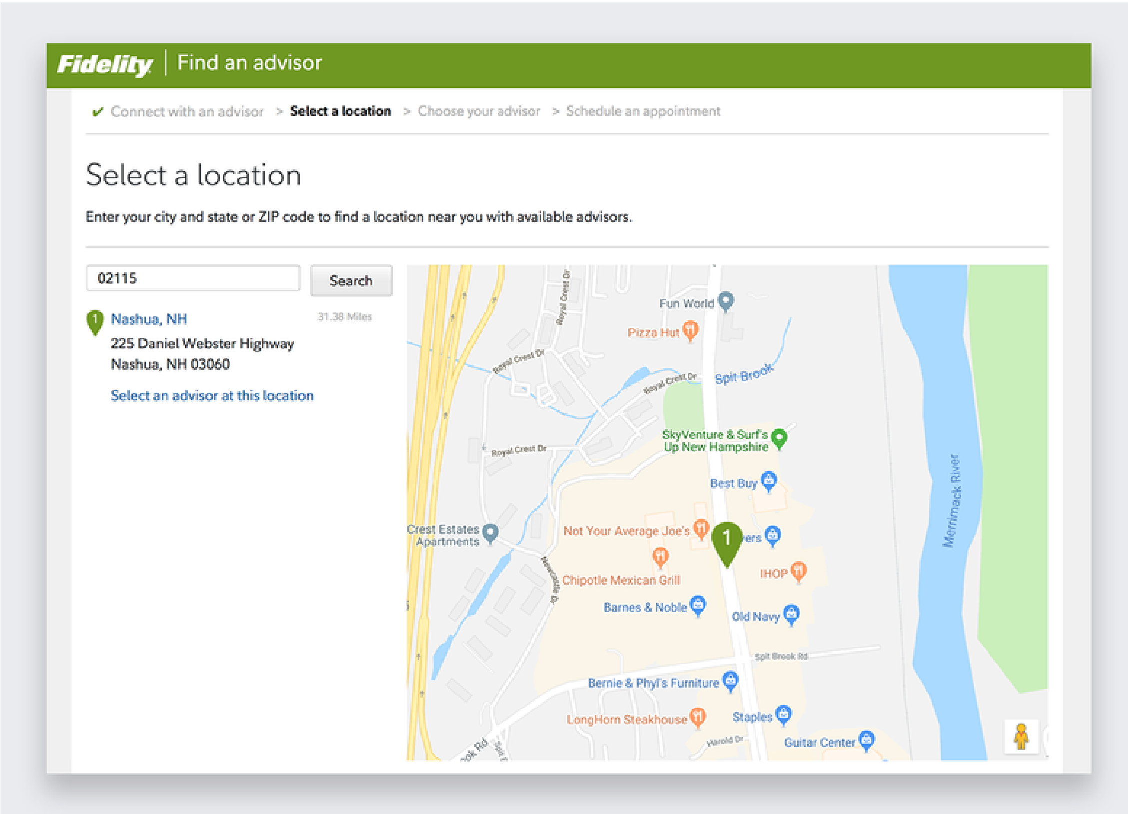
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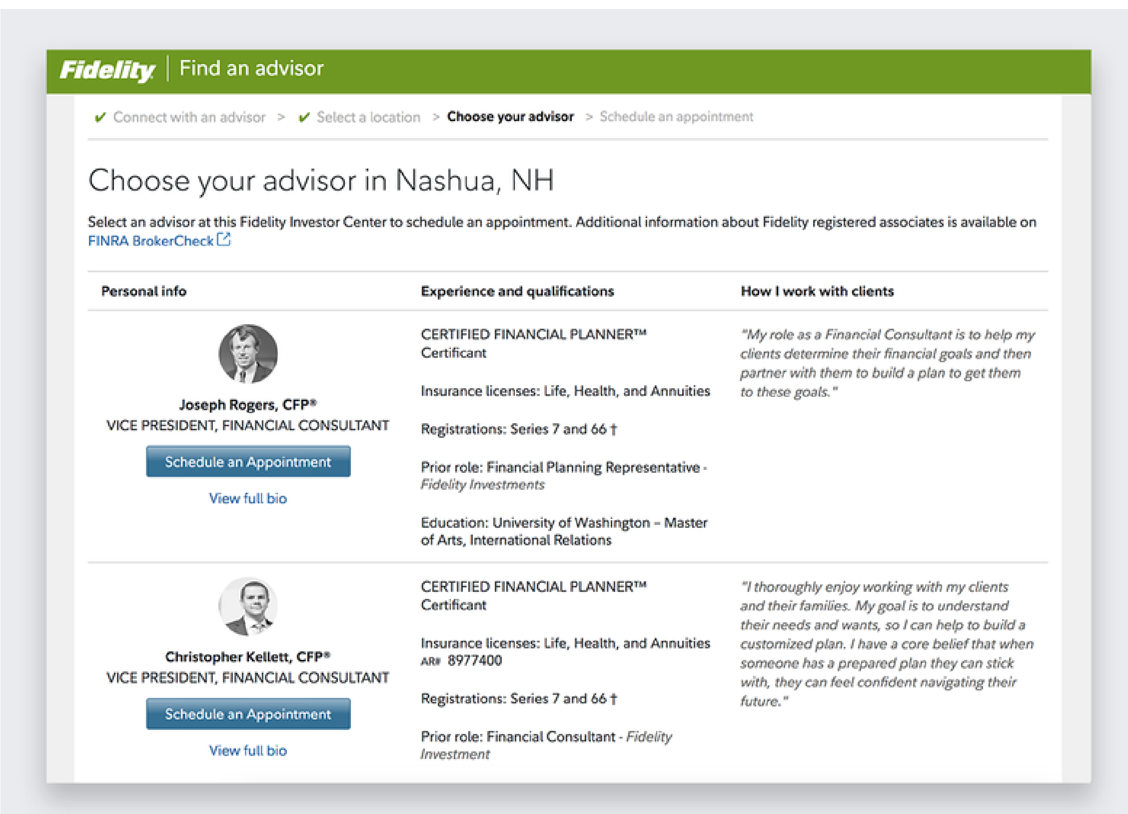
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CERTIFIED FINANCIAL PLANNER™ Certificant
Insurance licenses: Life, Health, and Annuities
Registrations: Series 7 and 66 †
Prior role: Financial Planning Representative - Fidelity Investments
Education: University of Washington – Master of Arts, International Relations
"My role as a Financial Consultant is to help my clients determine their financial goals and then partner with them to build a plan to get them to these goals."
Christopher Kellett, CFP®
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AR# 8977400
Registrations: Series 7 and 66 †
Prior role: Financial Consultant - Fidelity Investment
"I thoroughly enjoy working with my clients and their families. My goal is to understand their needs and wants, so I can help to build a customized plan. I have a core belief that when someone has a prepared plan they can stick with, they can feel confident navigating their future."

LIVE EXPERIENCE

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