

Project

Create a banner to be placed at the top of our customer home page. The banner should provide contextual relevance to what the customer is doing, along with set the stage for the landing experience.

There are 4 primary elements of the banner template that we need to adhere to:

- **Image**
- **Header**
- **Sub header**
- **Link button**

Context

Our objective is to interest the customers using our free service enough so that they are willing to consider having us manage their retirement account, and click to learn more.

Customers click here...

financial engines
retirement help for life

Retirement Plan | Your Profile | Account Activity | Log out

Customer Support | Get help

Current | Advice

Restore balance in your life.
Leave the rebalancing to us. [Learn more](#)

Investments
What are your investments worth?
As of Mar 1, 2013
JCPenney Savings Plan \$50,000
Other account 0.00
Total \$50,000

Portfolio details

Savings
What are your total annual contributions?
This includes all contributions we know about to your employer sponsored account.
\$17,000 per year

Savings details

retirement income
How much income could you have in retirement?
Starting at age 68
By age 68, your \$20,000 plus contributions (if any) could be worth \$904,000 or less if market performance is average. That amount, combined with Social Security, could produce \$90,300 or less per year of retirement income.
\$90,300 per year

How we estimate your income forecast

...and land here

financial engines
retirement help for life

Customer Support | Get help

We do the work with Professional Management. [Next](#)

You get a personalized plan and professionals to talk to.

We design and send your personalized Retirement Plan.
We'll tailor it to your situation and your investments.

We put your plan into action and help you stay on track.
We work with [Provider] to handle any transactions.

We keep you informed and answer your questions.
We monitor your account and make changes as needed.

Want to see how Professional Management could help you? [Play video](#)

What does it cost?
Your company has negotiated an annual program fee of no more than 0.6%—paid directly from your retirement plan account. [Learn more...](#)

Is it worth it?
In a recent study, people who used Help performed better than those who didn't 88% of the time. [Learn more...](#)

Special offer for [Plan Sponsor] ends [Deadline]
Add Professional Management to your account by [Deadline]. If you're not satisfied, cancel before [Grace Period Deadline], and pay no program fees. Or stay, and program fees will apply from your enrollment date.

Have questions? Call (800) 601-5957 or [chat with an Advisor](#)

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This is the first page customers see after logging into their account.

Possible value propositions

- You are in charge, we can do the work
- Taking care of this can be painless
- It's ok if you don't know what to do next
- Not sure what to do from here?
- Want us to manage this for you?

Note, these are high level ideas only, image, copy headline, sub headline, and action button (within template specs) should all be considered to work together.

Other considerations

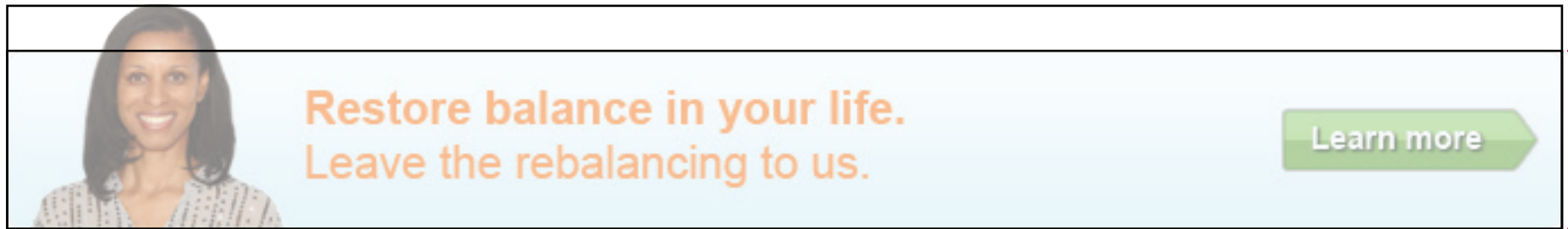
- The banner must fit in with our brand and customer experience
- No animation or rotation of messages
- This is a service upgrade, we should avoid overtly aggressive tactics
- Outside of the scope of this project, but over the long term, we will be planning on building out more robust landing experiences

Global Layout Details

All banners have a 1px border - color: #e5e5e5.
The corners for all banners have a border-radius of 8px.

H:100px
All Banners

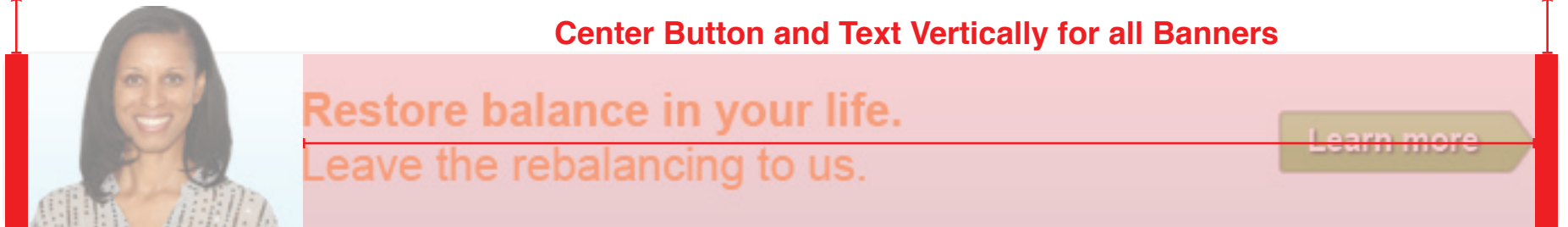
H:80px
All Banners



W: 690px - All Banners

W: 10px
All Banners

W: 10px
All Banners

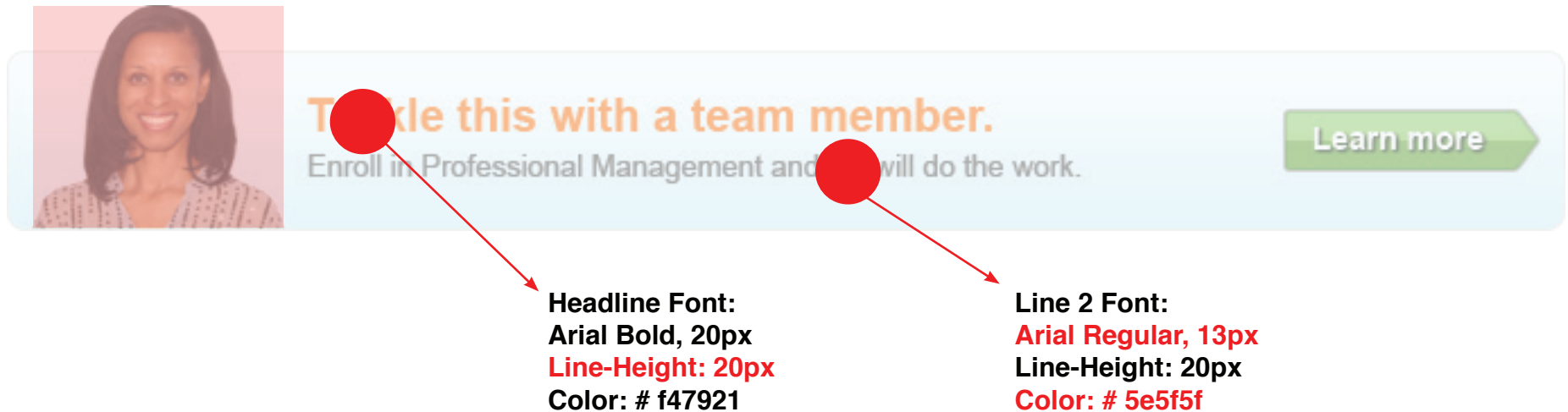


Banners with Image of Woman

Note: Where text specifications differ will be highlighted in Red.



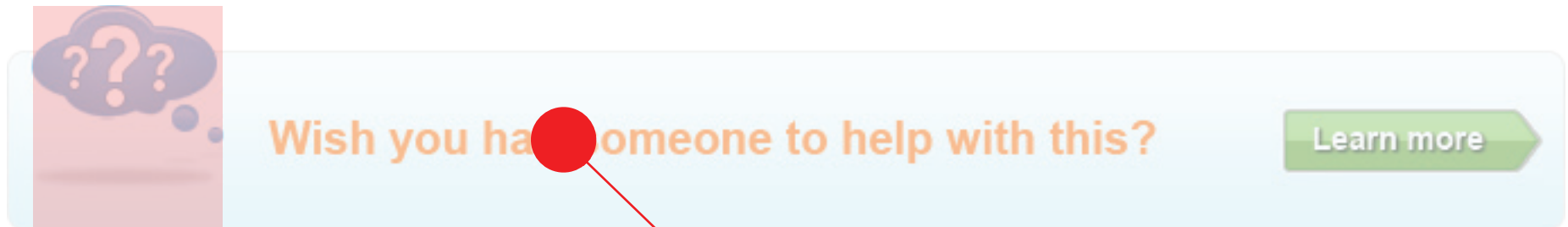
W: 112px H:99px



Banners with Question Mark Icon



W: 85px H: 99px



All Banners



Restore balance in your life.
Leave the rebalancing to us.

[Learn more](#)



Tackle this with a team member.
Enroll in Professional Management and we will do the work.

[Learn more](#)



Wish you had someone to help with this?
Get expert help and greater peace of mind with Professional Management.

[Learn more](#)



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