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|                          | Type   | Name                                   | Uploaded by    | Uploaded date | File size |   |
|--------------------------|--------|--|----------------|---------------|-----------|---|
| <input type="checkbox"/> | Folder | Bank statements                        | Alex Anski     | 01/03/2022    | 1.3Mb     | ⋮ |
| <input type="checkbox"/> | Folder | Bank loans                             | Andrea Binder  | 03/03/2021    | 23Mb      | ⋮ |
| <input type="checkbox"/> | JPG    | Jon_Ohana-Other_statement-2.jpg        | Andrea Binder  | 01/17/2021    | 431Kb     | ⋮ |
| <input type="checkbox"/> | PNG    | Washinton-jessicca_Mobile-upload.png   | Jon Levi       | 12/19/2019    | 1.5Mb     | ⋮ |
| <input type="checkbox"/> | PDF    | Letter-of-employment-wf58426874.pdf    | Pooja Shah     | 10/15/2019    | 770Kb     | ⋮ |
| <input type="checkbox"/> | JPG    | Brokerage-01-Jon5854125944.jpg         | Rachel Krauser | 07/09/2019    | 64Kb      | ⋮ |
| <input type="checkbox"/> | JPG    | Barbara_McFerris-Loans2019-Review.jpg  | Andrea Binder  | 06/06/2019    | 431Kb     | ⋮ |
| <input type="checkbox"/> | XLS    | Zachary-Jon-Raffle-2020-W2.xls         | Jon Levi       | 04/09/2019    | 1.5Mb     | ⋮ |
| <input type="checkbox"/> | PDF    | Letter-of-employm...avidson-334212.pdf | Pooja Shah     | 03/12/2019    | 770Kb     | ⋮ |
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**Properties Manager**

## Document properties

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**Statement-2020-chase-bank-001.txt**

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[Document details](#) ▲

|  |   |   |
|--|---|---|
| <b>Accounts</b><br>1234567890                | <b>Alternative reference</b><br>None        | <b>Business line</b><br>Wealth Management |
| <b>Classification ID</b><br>2345678901       | <b>Classification name</b><br>WM Classified | <b>Creation time</b><br>02:31:29.874      |
| <b>Processing ended time</b><br>23:10:52.568 | <b>Document date</b><br>5/25/2021           | <b>Document delete date</b><br>6/1/2021   |

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[Loan details](#) ▲

|   |                                   |                                  |
|---|-----------------------------------|----------------------------------|
| <b>Description</b><br>Chase Statement file for 2020 | <b>Filed time</b><br>08:45:00.521 | <b>Friendly ID</b><br>3456789012 |
| <b>Note count</b><br>12                             | <b>Recognizer</b><br>None         | <b>Signed</b><br>Yes             |

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|  |                                       |  |
|--|---------------------------------------|--|
| <b>Status</b><br>Active                  | <b>Tags</b><br>stock, Trade, Purchase | <b>Document type</b><br>TXT            |
| <b>Type category</b><br>Application Docs | <b>Type ID</b><br>BS587453951         | <b>Type name</b><br>Application Docs   |
| <b>Visible</b><br>No                     | <b>Employee ID</b><br>874536985112    | <b>Expiration time</b><br>24:00:00.000 |

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### Wealth Navigation Tree Test – 6/25/2021

This is a follow-up study, exploring the navigation structure and labeling of the unauthenticated "Wealth Management" tab.

- Focus was placed on the "Advisors & wealth teams" sub-tab, where two options of sub-sub tabs were tested (See Appendix.)

#### Key Findings:

**Both Nav options perform similarly.**

On both task success and attitude measurement, neither Nav option is a clear winner.

**On average, the Nav guides people to the right content ~1/3 of the time.**

When given representative (user-centric) tasks, most people thought their answers would be under "wrong" options in all but one case.

- The only exception is "You want to make an appointment with a professional to talk about investments you already own. Where would you go to do that?", where 63% of people picked the correct option in the minimal Nav (Nav 1).

**Both Navs set mixed expectations, but trend in the right direction**

Participants expect to see different things after clicking on nav options. However, expectations set by the Nav are reasonable and sometimes align with page content. Examples below:

*Nav 1: If you clicked "Explore our service teams" you would be taken to a page on the website. What would you expect to see on that page?*

- "A list of the teams and the services they provided"
- "Lists of all the names of financial advisors"
- "How to find a financial advisor."
- "Funds of all kinds"
- "A list of fees."

*Nav 2: If you clicked "Wealth management professionals (starting at \$100,000 in investments)" you would be taken to a page on the website. What would you expect to see on that page?*

- "The professionals who handles (sic) accounts starting at \$100,000"
- "Ways to improve my portfolio. Questions to determine my assets and available funds. Questions about where that is, stocks, bonds, funds, etc."
- "Fees for using this service"

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| <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>FILTER BY</b></p> <p>Category</p> <p>File type</p> <p>Upload date</p> <p>Upload date range</p> <p style="text-align: right;"> <span style="border: 1px solid #0056b3; padding: 2px 5px; margin-right: 5px;">Clear all</span> <span style="background-color: #0056b3; color: white; padding: 2px 5px;">Apply</span> </p> </div> |                                  | Statement-sept-2021.xml | Alex Anski  | 10/15/2021    | 253KB                                |
|  | Mortgage-MJRM1234567890.pdf      | Alex Anski              | 01/03/2022  | 1.3MB         | <span style="float: right;">v</span> |
|  | Draft-statement-2020-chase.eps   | Andrea Binder           | 03/30/2020  | 23MB          | <span style="float: right;">v</span> |
|  | Jon_Ohana-Other_statement-2.jpg  | Andrea Binder           | 01/17/2020  | 401KB         | <span style="float: right;">v</span> |
|  | Loan3343_Jonathan-Navarov.png    | Cecelia Bukowski        | 11/21/2021  | 2.7MB         | <span style="float: right;">v</span> |
|  | January2020_Paystub.eml          | Cecelia Bukowski        | 09/03/2019  | 12MB          | <span style="float: right;">v</span> |
|  | Washinton-jessica_Mob-upload.png | Jon Levi                | 02/19/2018  | 1.5MB         | <span style="float: right;">v</span> |
|  | Letter-of-employment-wf584.pdf   | Poopa Shah              | 10/15/2021  | 770KB         | <span style="float: right;">v</span> |
|  | Zachary-Jon-Raffie-2020-W2.jpg   | Rachal Krauser          | 08/11/2021  | 8.3MB         | <span style="float: right;">v</span> |
|  | Brokerage-01-Jon5854125944.jpg   | Rachal Krauser          | 01/09/2022  | 54KB          | <span style="float: right;">v</span> |

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