Example of Visual Concept

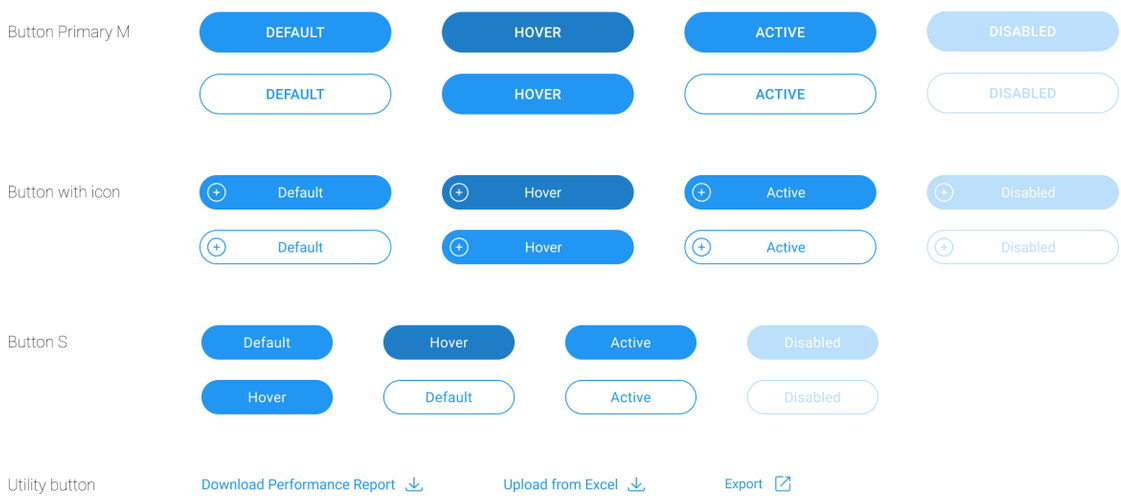
01 Ux - research

Before starting the creation of the app design, we conducted a thorough study of the user experience, the work of advisors, as well as more than 15 similar applications in the software market. Having analyzed the data, our designers compiled a package of a user interface for the solution.

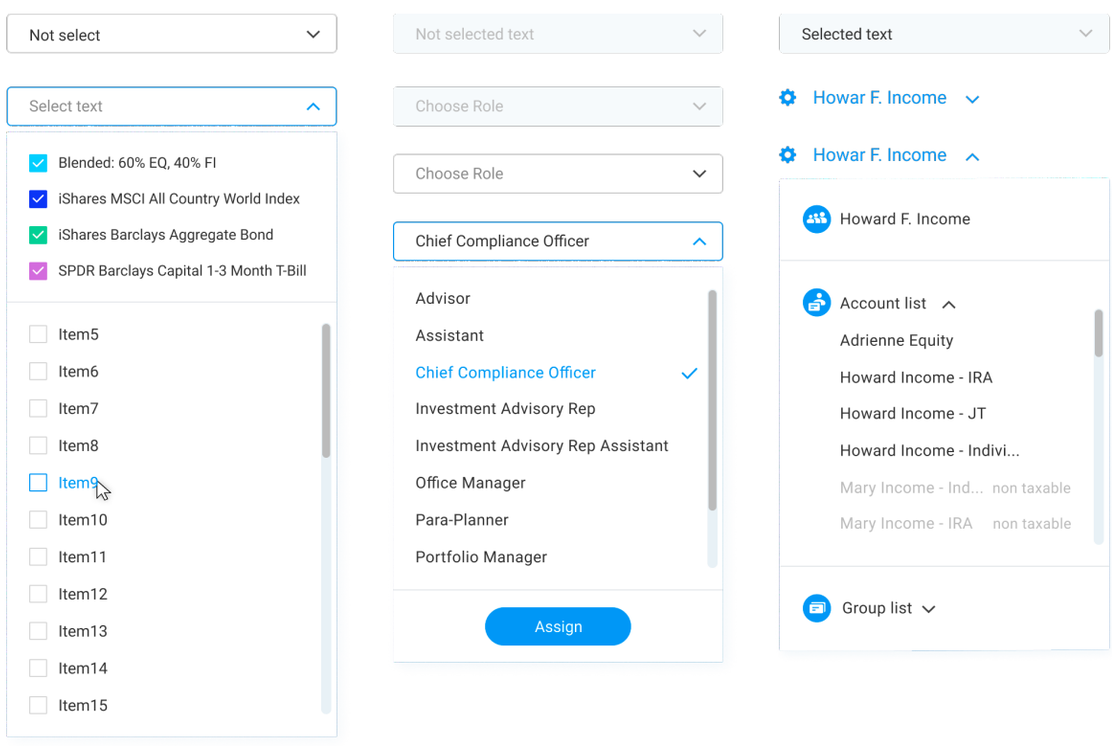
02 UI - system

The application is designed in blue and white colors. There are no other shades and harsh colors so that the color scheme neither irritate the user nor distract attention from the content. Only the most necessary buttons are embedded in the interface to avoid its overburdening. Also, our designers thoroughly worked on the application icons, guided by the principle of minimalism.

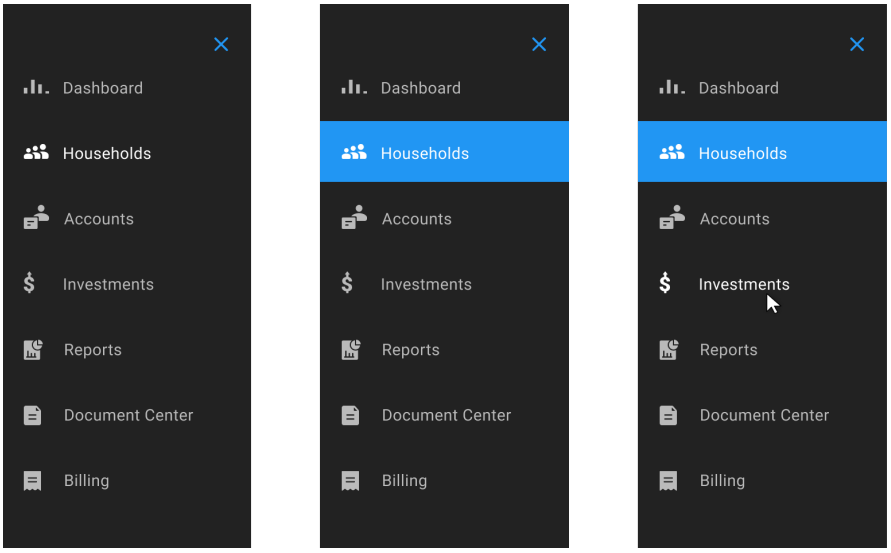
Buttons

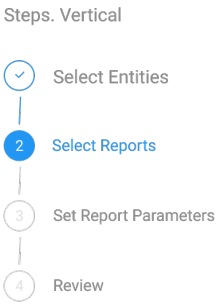


Navigations



Menu

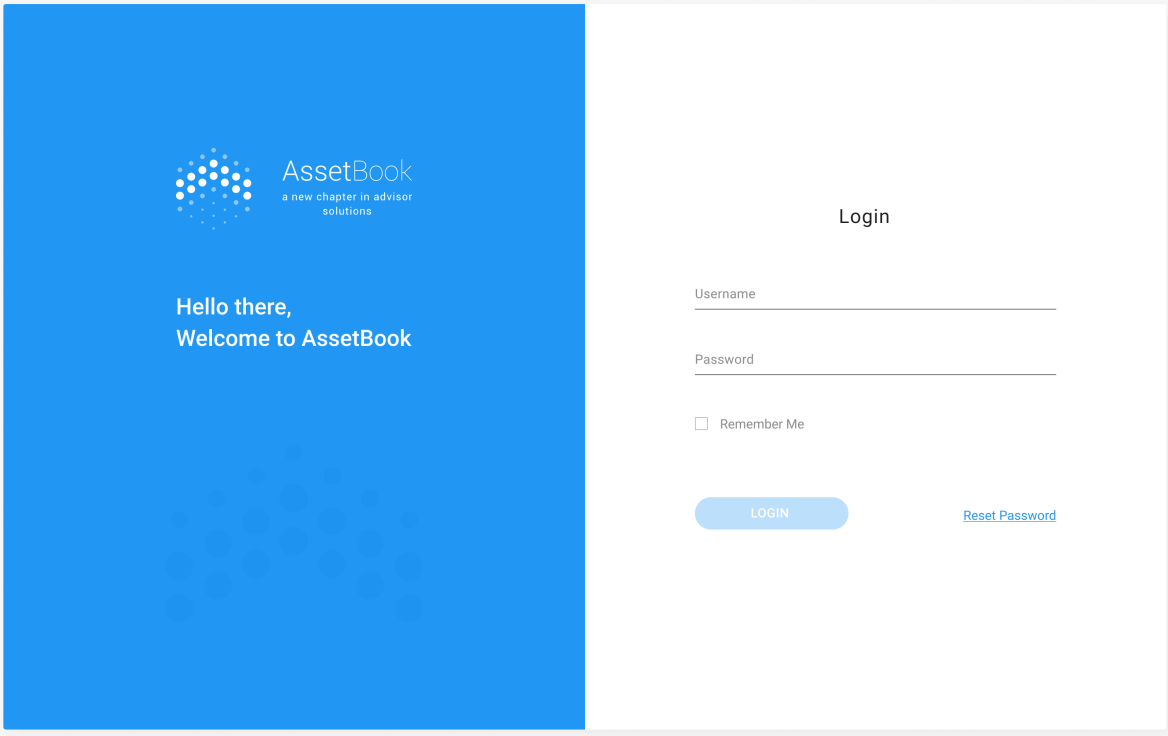




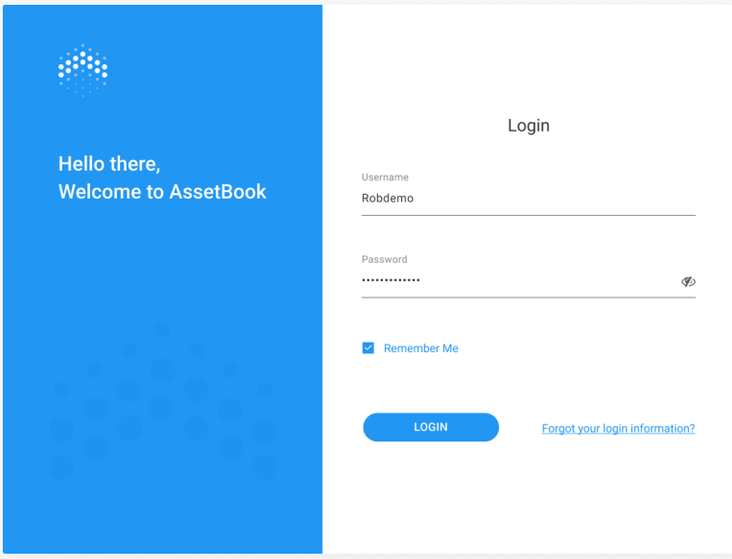
03 Main pages

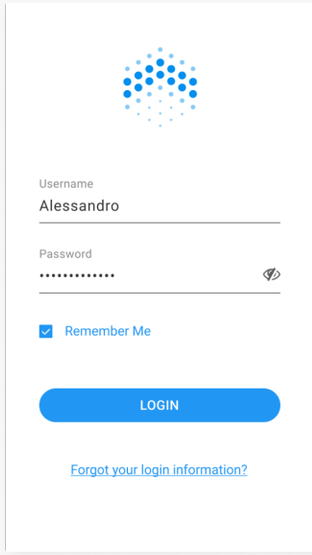
Login Page

In order to make the registration process convenient, we have built a simple form that allows advisors to start using the application in a matter of seconds.



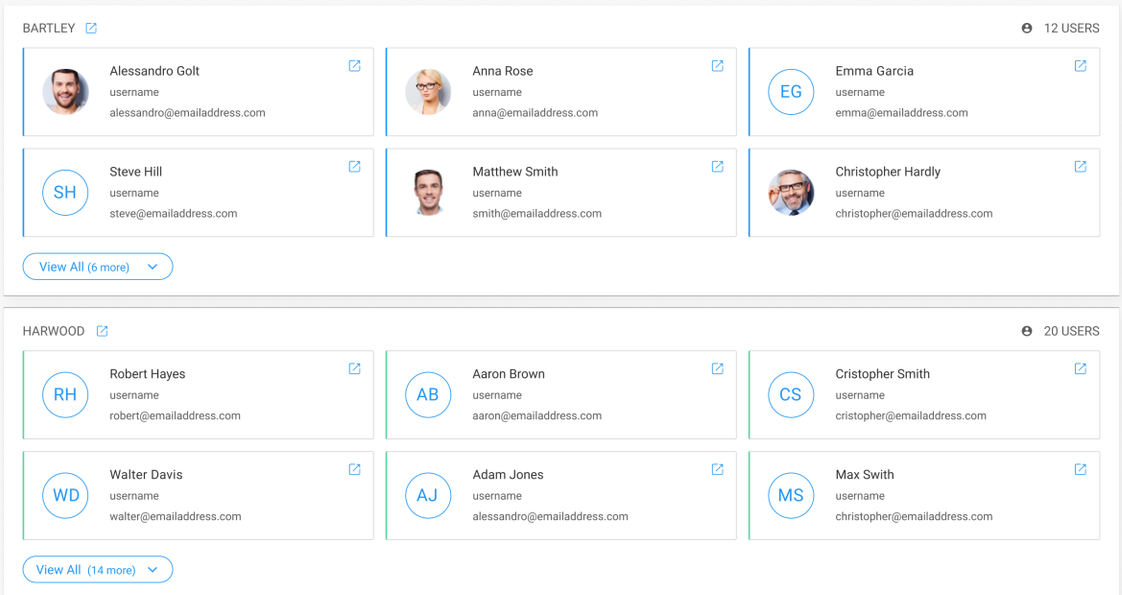
Responsive versions





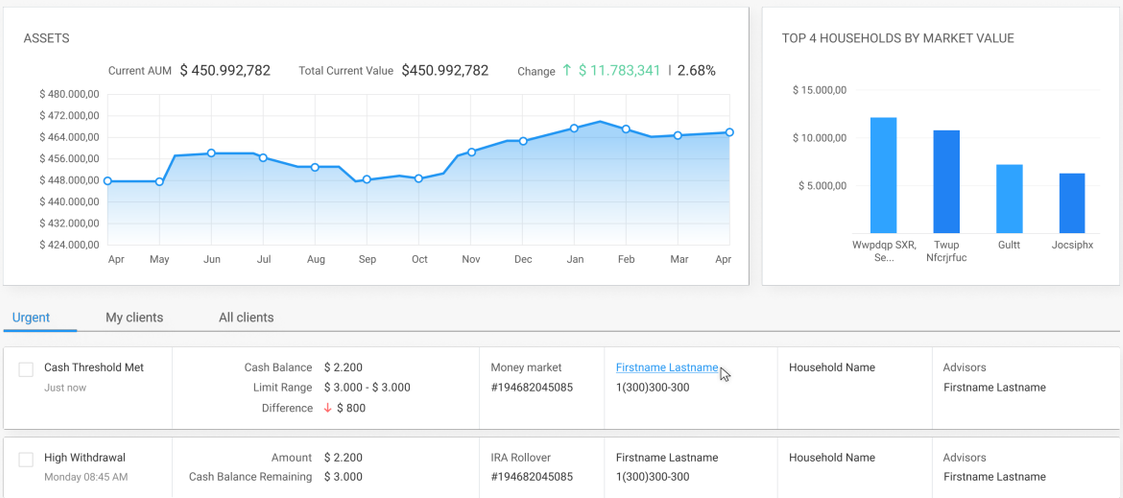
Impersonation

The application gives each user the opportunity to create their own database with clients. On the Impersonation page, an adviser can find the database they need, view it, and select a client's account to see information about their assets.

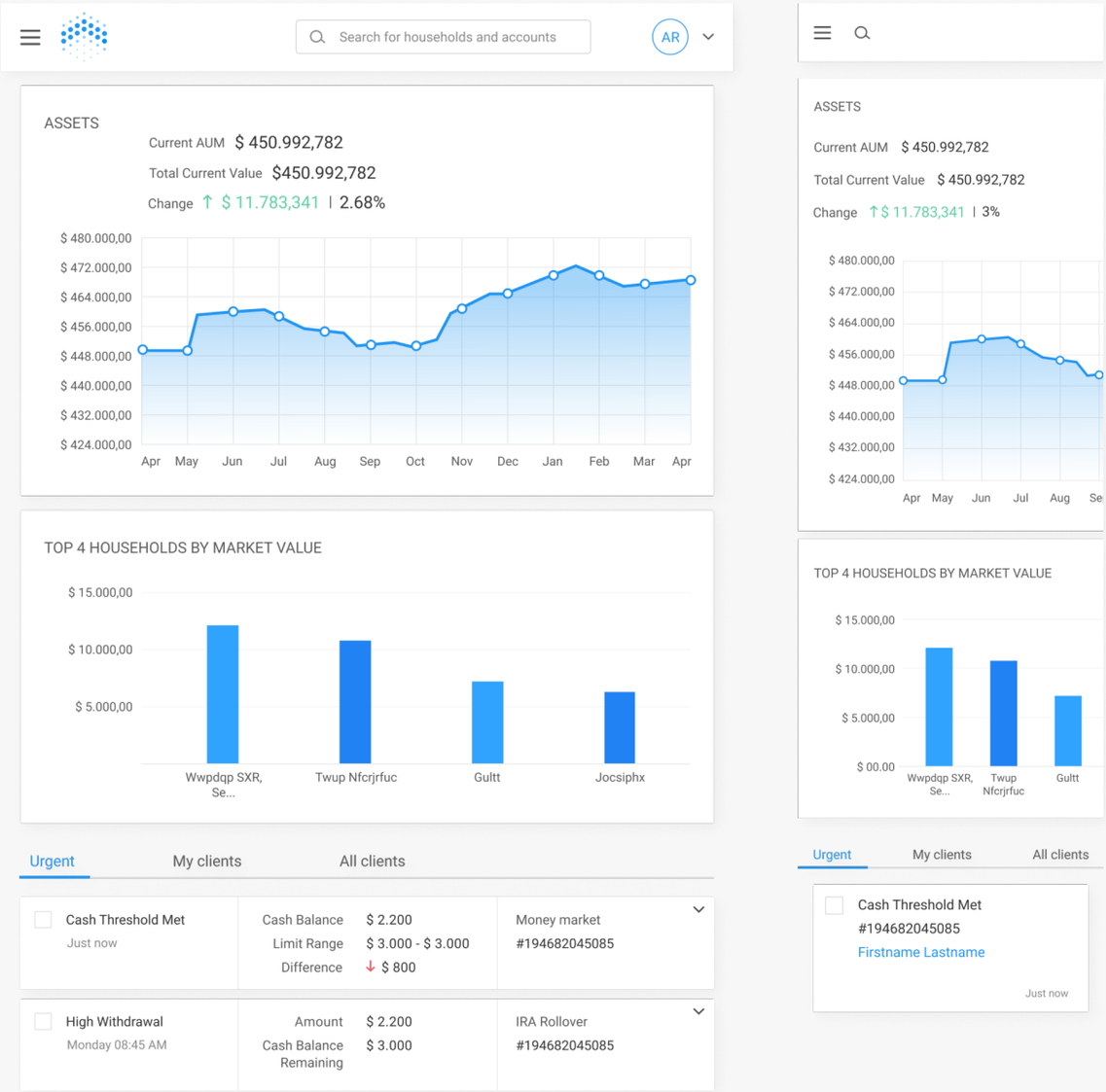


Dashboard

This page displays a chart of the client assets growth over a certain period of time, for example, over a year. Here, the adviser can also see the top 4 households by market value, as well as various notifications.

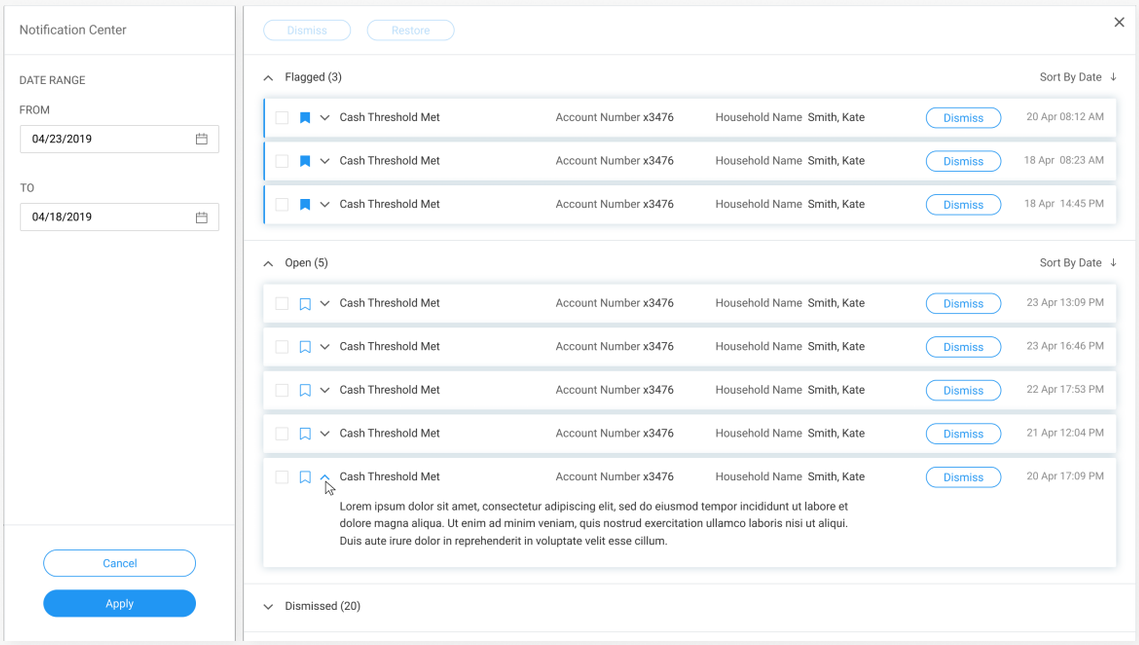


Responsive versions



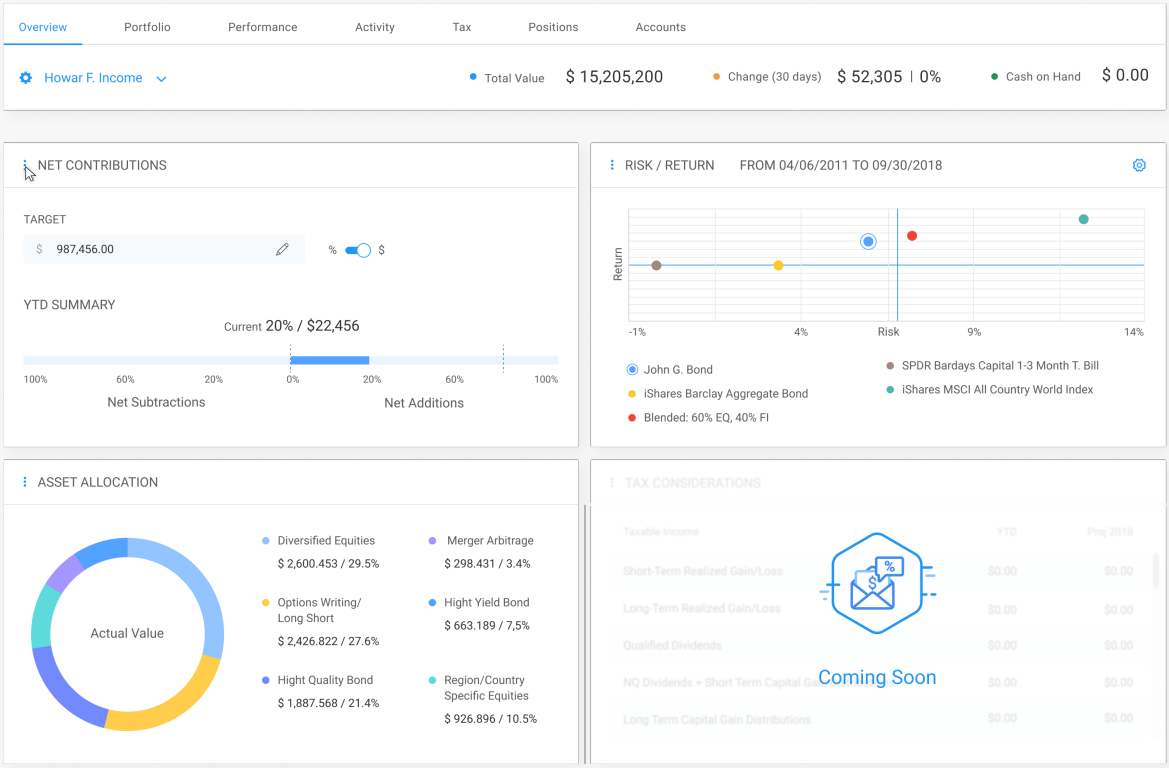
Notification Center

The notification center works as storage that gives users the opportunity to view all notifications, or, if necessary, those of a separate account and for a certain period of time. The users can also delete and restore notifications.



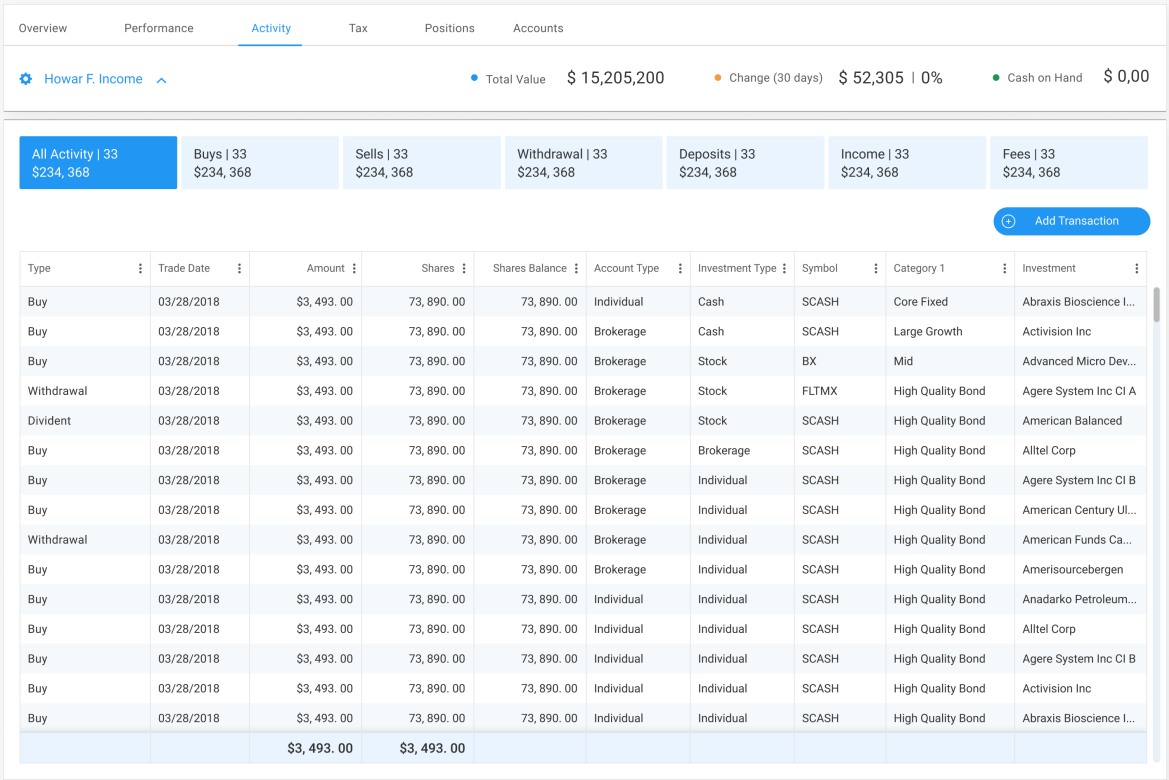
Dashboard

Selecting the required client account, an advisor gets to a dashboard. In addition, on the dashboard, the user can analyze the assets allocation, annual income, and information on taxes paid.



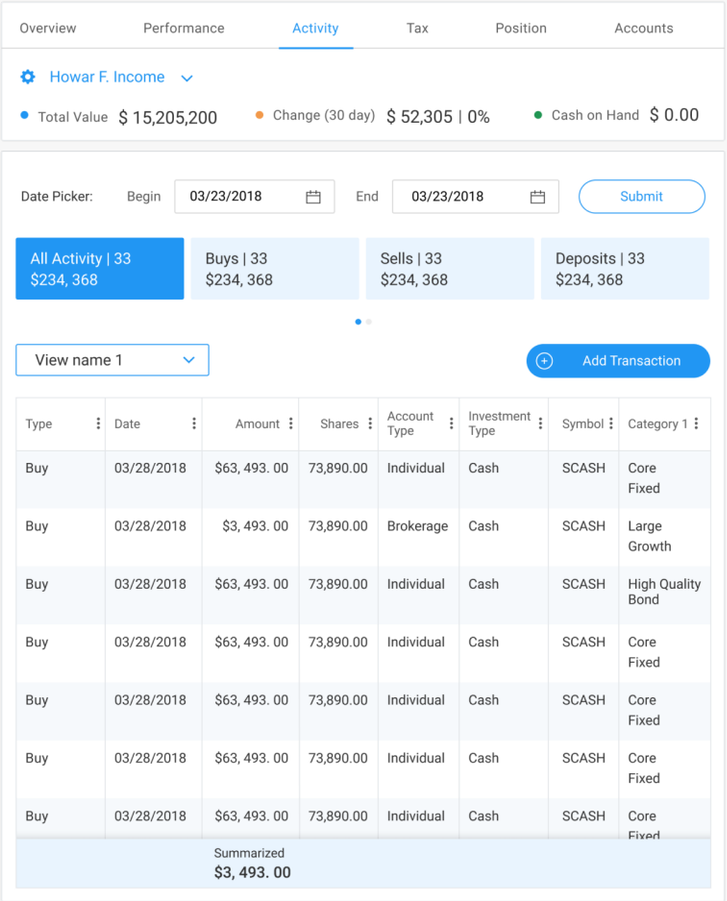
Activity

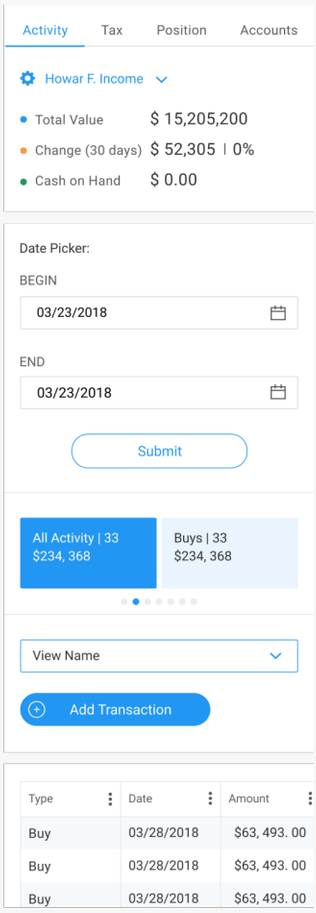
The Activity tab is included so that the user can view the financial activity of the client. Here, such information as a purchase of securities, their sells, deposits, withdrawals, etc.



Type	Trade Date	Amount	Shares	Shares Balance	Account Type	Investment Type	Symbol	Category 1	Investment
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Cash	SCASH	Core Fixed	Abraxis Bioscience I...
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Cash	SCASH	Large Growth	Activision Inc
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Stock	BX	Mid	Advanced Micro Dev...
Withdrawal	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Stock	FLTMX	High Quality Bond	Agere System Inc Cl A
Divident	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Stock	SCASH	High Quality Bond	American Balanced
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Brokerage	SCASH	High Quality Bond	Alltel Corp
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Individual	SCASH	High Quality Bond	Agere System Inc Cl B
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Individual	SCASH	High Quality Bond	American Century Ul...
Withdrawal	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Individual	SCASH	High Quality Bond	American Funds Ca...
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Brokerage	Individual	SCASH	High Quality Bond	Amerisourcebergen
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Individual	SCASH	High Quality Bond	Anadarko Petroleum...
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Individual	SCASH	High Quality Bond	Alltel Corp
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Individual	SCASH	High Quality Bond	Agere System Inc Cl B
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Individual	SCASH	High Quality Bond	Activision Inc
Buy	03/28/2018	$3, 493. 00	73, 890. 00	73, 890. 00	Individual	Individual	SCASH	High Quality Bond	Abraxis Bioscience I...
		$3, 493. 00	**$3, 493. 00**						

Responsive versions

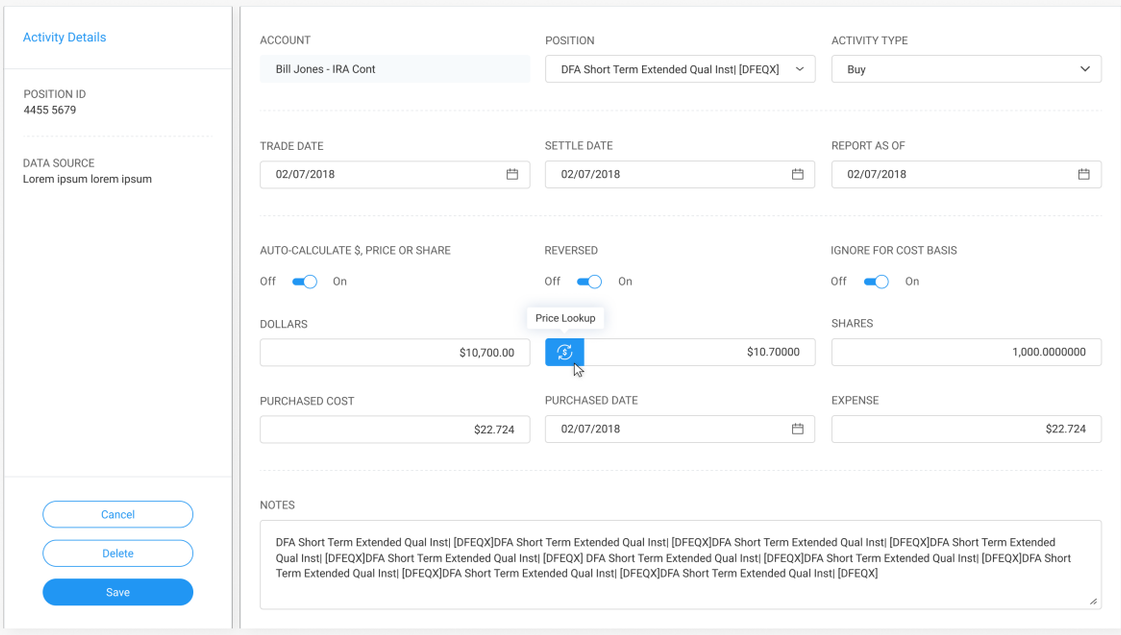




03 Several pages

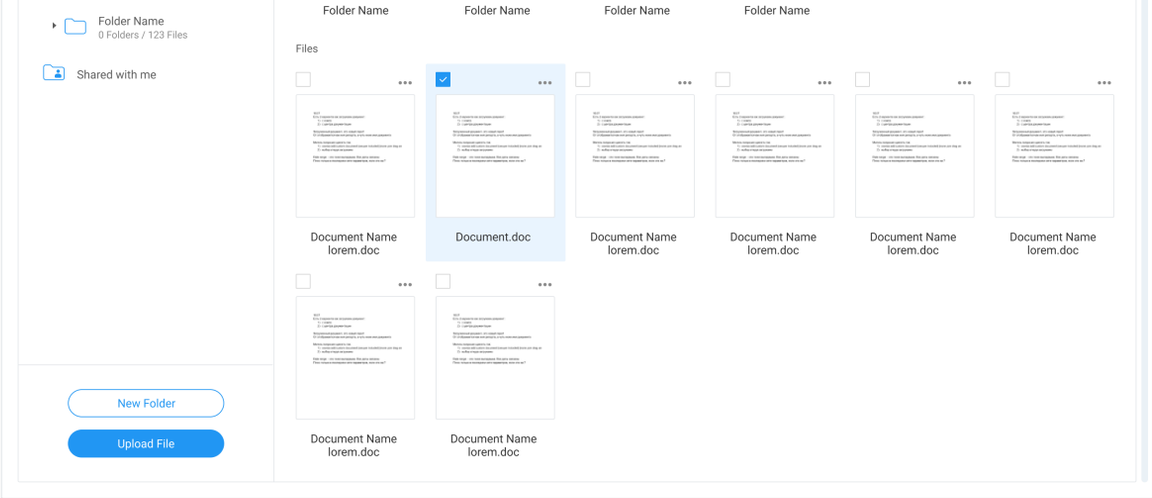
Activity Details

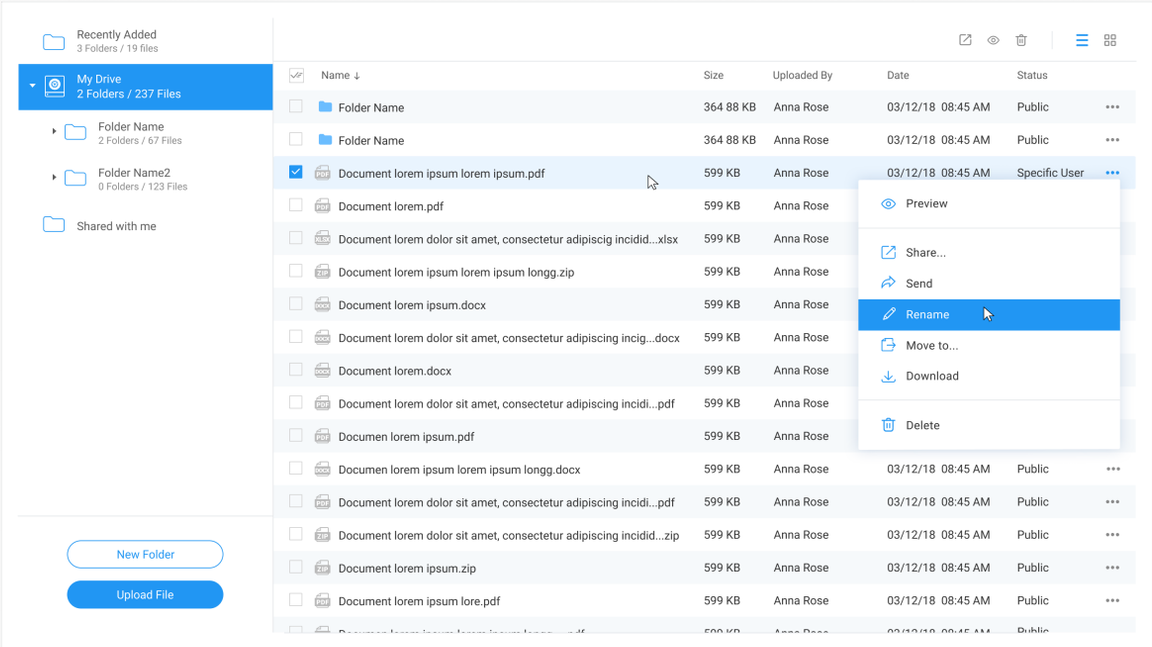
Here a user can view detailed information about the client's activities with their assets.

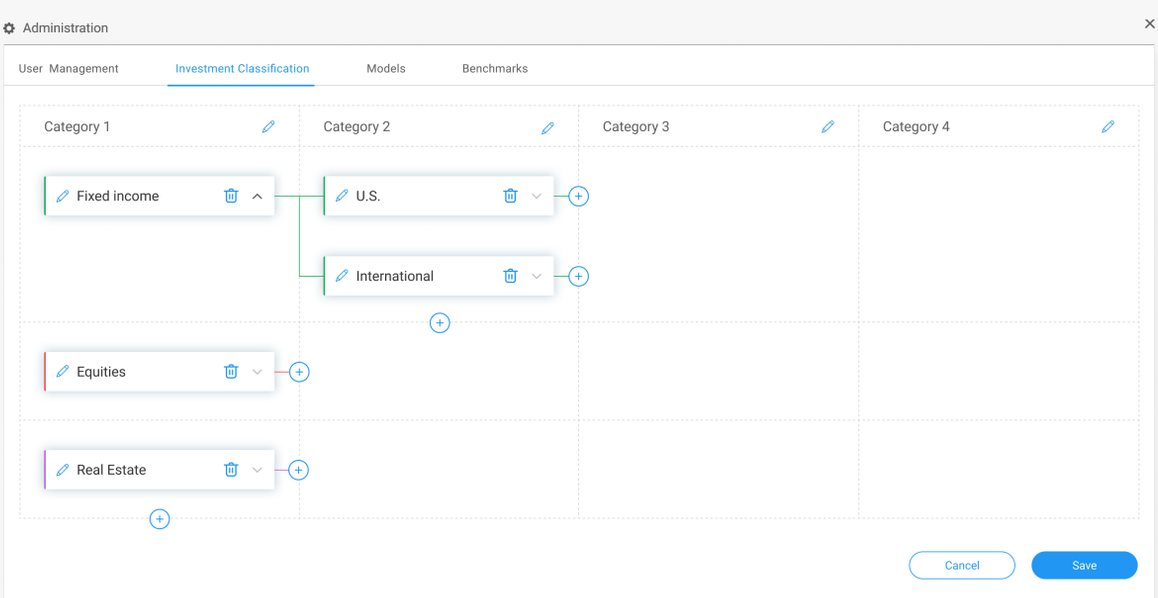


Document center

In the Document center, an adviser can download reports and other documents necessary for managing client's assets.





Setting. Administration

In order to make the application easy to use, we have introduced the ability to create various categories for more convenient sorting of information.