

# Deliver experiences that engage and evolve

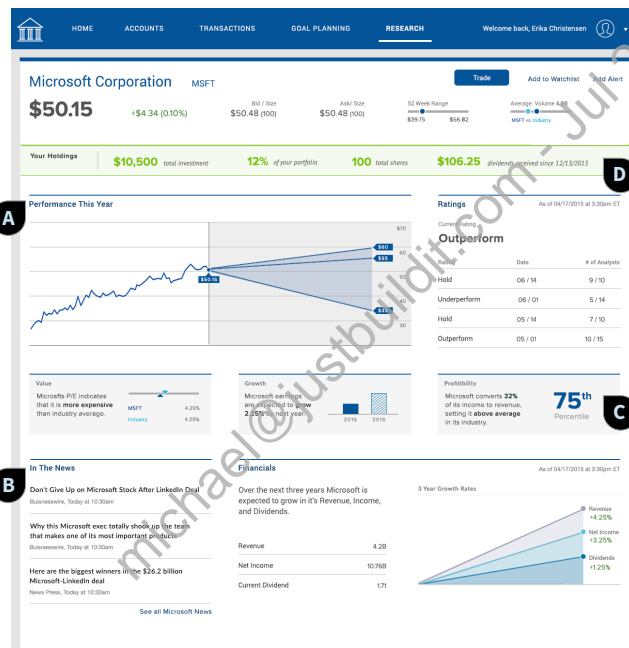
**Personalization enhances digital experiences with content, tools and workflows that are deeply targeted through segments and insights.**

## Segment/Personas

Personas can be defined by investor type and content surfaced based on their research needs.

## User Insights

Experiences can be modified to the individual investor, such as portfolio holdings.

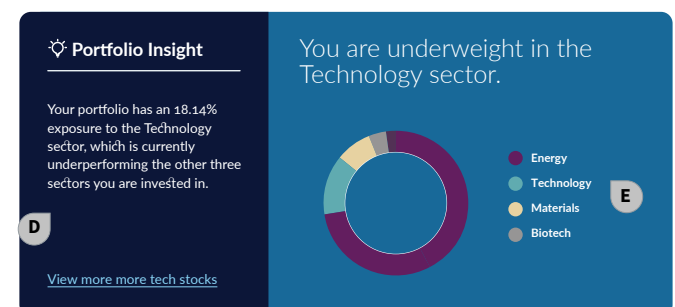


A Monthly/yearly timeframes

B News and research

C Fundamentals

D Holdings information



A Performance since purchase

B Total unrealized gain

C Total dividends/income

D Exposure to the sector

E Performance segment/personas

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Behavioral Data

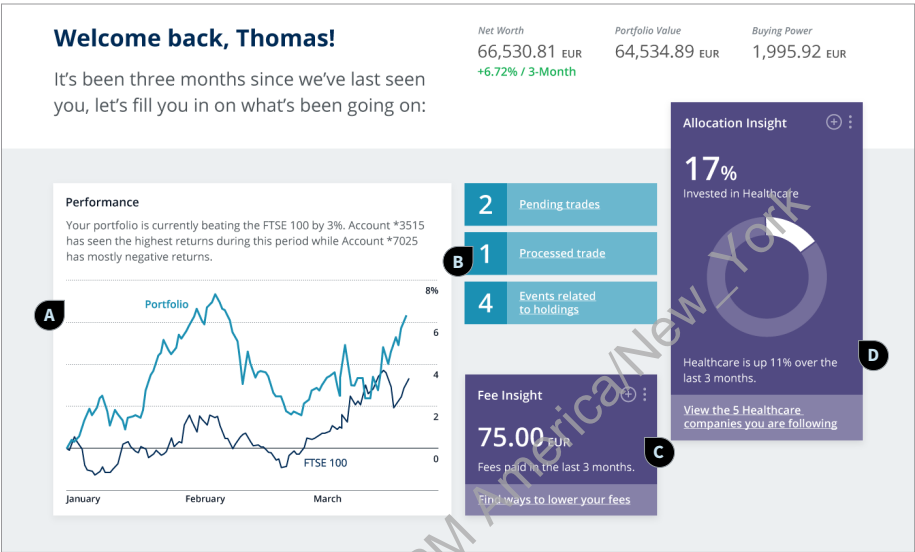
Modifying the experience based on actions taken by the user within or across visits.

A Portfolio performance over time

B New trades or events

C Fees paid

D Allocation insights for the last 3 months



Implementation

Strategy	<ul style="list-style-type: none"><li>Develop a business KPI-driven personalization strategy</li><li>Conduct usage analysis audit to determine currently available data</li></ul>
Theory development	<ul style="list-style-type: none"><li>Identify elements of the user journey that most impact the defined success metrics and apply experimentation</li></ul>
Content creation	<ul style="list-style-type: none"><li>Design and build the envisioned personalized experiences</li><li>Deliver presentation elements, data integrations, audience targeting, rules engine configurations and analytics through a controlled process that allows for incremental and comparative (A/B) testing</li></ul>
Optimization	<ul style="list-style-type: none"><li>Continually analyze the personalized user experiences</li><li>Optimize designs and targeting rules, improving the user journey to deliver increasingly relevant experiences and accomplish business goals</li></ul>