



PHOTO: ILLUSTRATION BY MICHELA BUTTIGNOL

Final Prototype: MyFinancesUW

Project Group Members: Andy Cai, Renee Singh, Zach Puckett, Jessica Forcucci, Justin Mai
INFO 200 | Section AF | Sophia Xiao

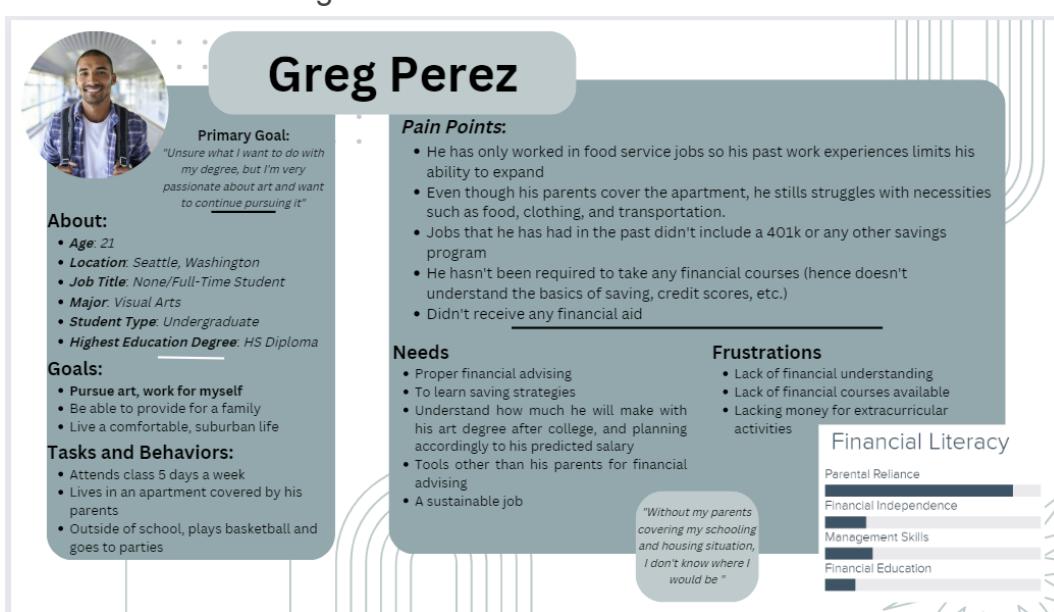
Table of Contents

Low-Fidelity Wireframing Stage	5
Moodboard	6
Design Language / Style Guide	6
Font	6
Colors	7
High-Fidelity Wireframes	8
Onboarding	8
Usage Scenario 1	13
Usage Scenario 2	15
Usage Scenario 3 (optional)	16
Interactive Prototype	17
Bibliography	18
Appendix	19

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- Cover Page: Team logo, project brief, team member names.
 - Team Members:
 - **Renee Singh:** My strengths include research, data visualization, and analysis. I will be focusing on gathering information and data to support the project, while also maintaining an organization system for our documents.
 - **Jessica Forcucci:** My strengths include writing, design, and organization. I will be responsible for taking notes during our meetings and contributing to the writing portion of deliverables. I can also sketch the prototype of our solution and be responsible for editing the content/grammar of the writing portions.
 - **Zach Puckett:** I'm responsible for the larger portions of writing when summarizing our findings and ideas. I'll also be checking in with our group to ensure that we meet deadlines by consistently developing our project throughout the quarter.
 - **Andy Cai:** I can do research on the internet, use all the Microsoft Office software, and do formatting. I also arrange weekly meetings and remind everyone when the meetings are (and set up Zoom).
 - **Justin Mai:** My strengths consist of research and analyzing data (if needed). I will be conducting research, formulating solutions, creating user persona, conducting interviews, and designing part of the prototype and layout. I'm also responsible for submissions.
 - Introduction:
 - We want to investigate the barriers young adults face in accessing resources of financial knowledge, to develop information that connects young adults to resources that improve financial literacy.
 - Quality of life is centered around money, making managing this resource extremely important. While an individual's job is the source of their revenue, understanding where to divert this money becomes just as important when factors such as student loans and credit card debt come into play. The distribution of money to the proper institutions is necessary for overcoming these issues and setting ones' self up for financial stability. Financial literacy defines the ability to execute this distribution properly, and the concept of financial literacy often dictates whether or not an individual will properly distribute their money in ways that set them up for a comfortable future. Creating access to information that connects young adults to educational resources on financial literacy, would ensure that the

future generation is capable of making financial decisions that strengthen their future for the better.

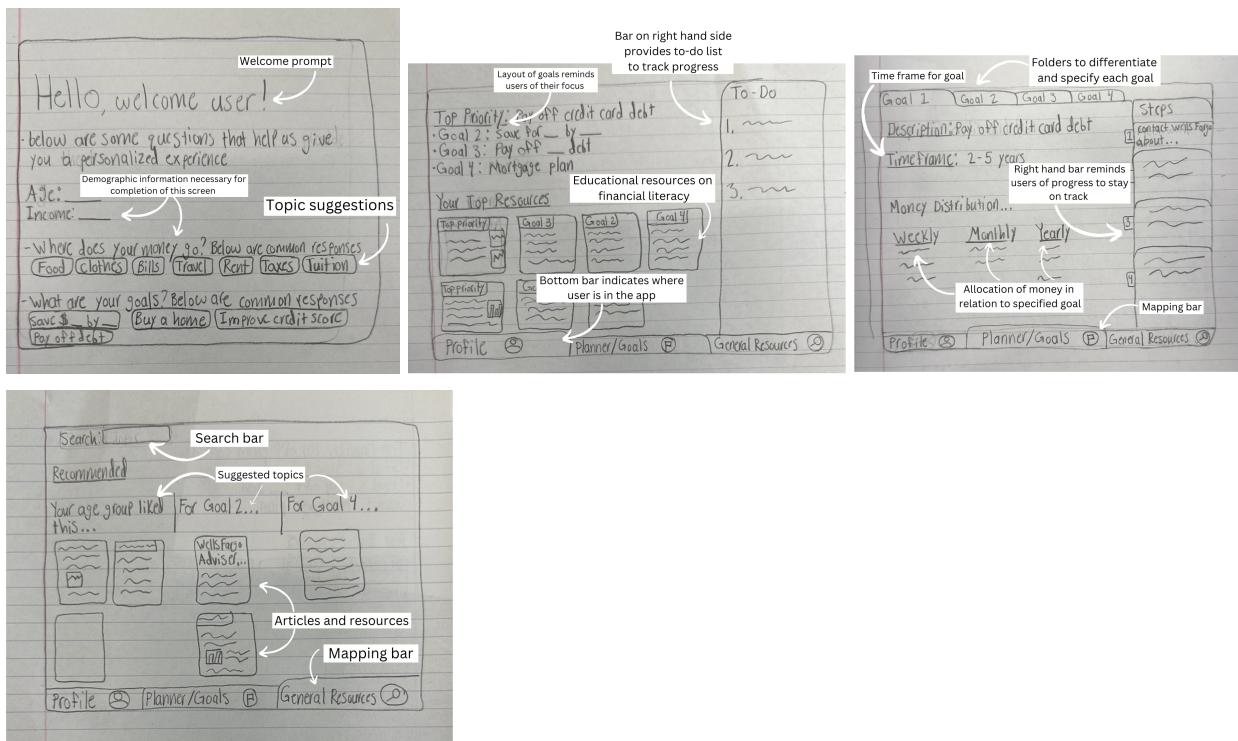
- User Research:
 - We used a survey to gather general information about our demographic
 - We conducted interviews with a wide range of people within our demographic to gather more in-depth information about their financial situations and literacy
 - Survey link:
<https://docs.google.com/forms/d/1eX-SCH2ullZr95h-AlorJoO07kLYc0CFatqXilB83mY/edit>
 - Survey Results:
<https://docs.google.com/forms/d/1eX-SCH2ullZr95h-AlorJoO07kLYc0CFatqXilB83mY/edit#responses>
- Persona Used for Usage Scenario



- Solutions Considered
 - Financial Course Availability (college level)
 - App/Website
 - AI Program
 - Finance Distribution System
- Selected Solution
 - We decided to create a website tailored to helping an individual's financial problems. We also integrated an AI program to interact with users and help them navigate their financial situations and the website itself.
- Description of your solution

- Our chosen solution is a website that provides personalized financial information to its users. After signing up, the users will be given a quiz to take. This quiz will ask screening questions about their demographics, and then more specific questions to identify their financial goals. The website will then suggest specific goals which the users can add to their personal dashboards. This personal dashboard will act as a summary page displaying all their goals on one page. Each goal will come with its own page of resources, as well as customizable trackers for the user to keep track of their progress. In addition, there will be a general resources page from which the user can explore other goals they might want to add to their dashboard, as well as a chatbot function if the user needs any extra assistance.

- Product Features
 - Sign-up page, Quiz Page, Profile Page, Dashboard, General Resources Page, ChatBot AI
- Low-Fidelity Wireframes



Low-Fidelity Wireframing Stage

The main piece of feedback that we received was to bring all of our pages together, in other words, to have a clear and distinct menu that helps us easily navigate from one page to another. Another piece of feedback that we received was to add drop-down menus and icons specific to each function. Some other pieces of feedback were to create a more ‘website-like’ interface for our users, make our pages less textual-based, and add some type of tracking system for progress.

Through our feedback, we learned that there were a lot more functions that we needed to add to create a website that is both informative and interaction based. The main issue we faced was a lack of connection between our pages, largely due to the interface of each page not being connected to one another. Something else that we need to add are icons and images that symbolize each function of our website. Overall, these will be the steps we have to take for a positive user experience.

Some of the revisions that we made were that we added a dropdown menu to our navigation bar instead of the tabs on the bottom which gave us more room to add other functions to each page and created a cleaner interface. Something else that we added was a progress bar to help motivate users in their financial journeys. Also, one addition to our wireframe is an AI feature that supports users in their financial goals as well as guides them to various other resources that’ll help them along the way. Overall, there were other textual and layout changes that we made to keep each page of our wireframe consistent with one another, but these were the main revisions that we made and want to add to our high-fidelity wireframe.

Moodboard

Moodboard Link: <http://www.gomoodboard.com/boards/L62cySha/share>

Design Language / Style Guide

Font

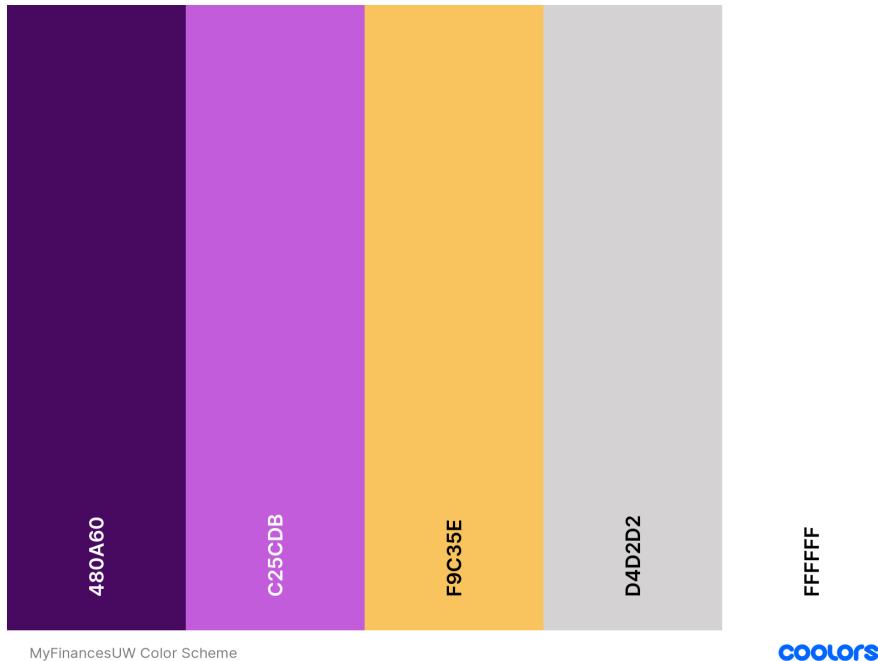
For our headers, we picked the font 'Poppins'. This font looked neat and readable, especially when used for shorter texts with a large font. Lora was used for smaller text and paragraphs, as it came across as professional while still fitting into our more modern theme.



(Local Fonts, 2022)

Colors

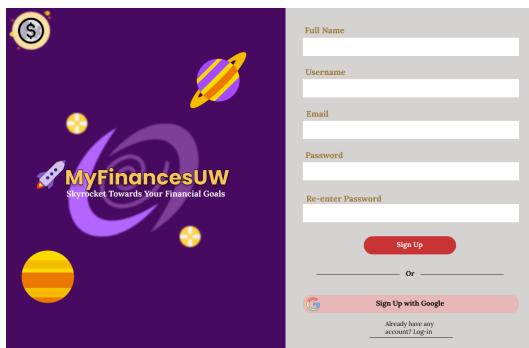
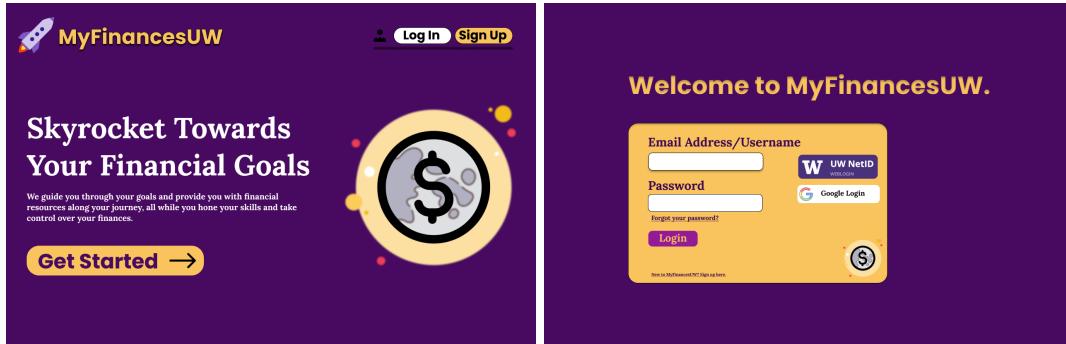
Since our website was made to be for UW students, we used a purple and yellow color scheme to match the school colors. We also used white and gray for accents.



High-Fidelity Wireframes

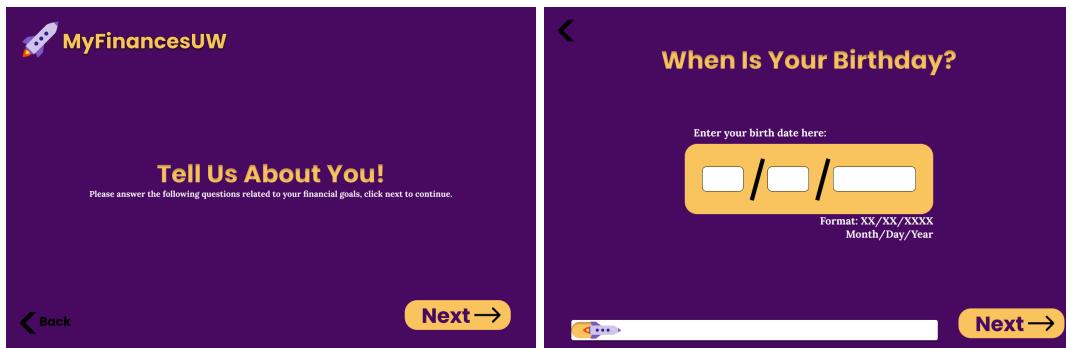
Onboarding

On the onboarding screens, the user has the option to sign up or log in. If they log in, they will be immediately taken to their dashboard. If they sign up, they will go through the quiz first.



Quiz

The quiz allows the user to input information on their income level, how they spend their money and tell us their financial goals. This allows us to customize goals and provide resources that best fit them.



What Is Your Current Range of Income?

- No current form of income
- \$1-\$999
- \$1,000-\$9,999
- \$10,000-\$19,999
- \$20,000-\$49,999
- \$50,000-\$74,999
- \$75,000-\$99,999
- \$100,000-\$249,999
- \$250,000+

[Next →](#)

What Does Your Money Go Towards?

Select all that apply.

Search

Common Responses:

Food
Clothes
Bills
Travel
Rent

Taxes
Tuition

[Next →](#)

Rank Your Current Money Goals!

1. Drag and Drop Here

2. Drag and Drop Here

3. Drag and Drop Here

Search

Lorem ipsum dolor sit amet, consectetur
Lorum ipsum dolor sit amet, consectetur

[Submit →](#)

Thank You!

Click next to proceed to your dashboard.



[Next →](#)

Navigation

Once the user has been onboarded and taken the quiz, each page includes a navigation screen so the user can visit other pages on the website. To access the navigation screen, the user has to click their profile icon in the top right of the page.

Main Dashboard

The main dashboard briefly summarizes the users' tasks and allows them to view all their goals on one page.

The image displays three separate screenshots of the Main Dashboard, each showing a different configuration of goals and user information.

- Screenshot 1:** Shows "Top Priority Goals" with three items: 1. Buy a car, 2. Plan student loan repayment, and 3. Financial Independence from parents. Below this is a section titled "Click to access goal pages:" with three cards: Goal 1 (car icon), Goal 2 (piggy bank icon), and Goal 3 (credit card icon).
- Screenshot 2:** Shows "Top Priority Goals" with the same three items. Below this is a section titled "Click to access goal pages:" with three cards: Goal 1 (car icon), Goal 2 (piggy bank icon), and Goal 3 (credit card icon). This version includes a sidebar on the right with sections for "Goal 1", "Goal 2", and "Goal 3", each listing specific tasks.
- Screenshot 3:** Shows "Top Priority Goals" with the same three items. Below this is a section titled "Click to access goal pages:" with three cards: Goal 1 (car icon), Goal 2 (piggy bank icon), and Goal 3 (credit card icon). This version includes a sidebar on the right with sections for "My Profile" (containing "First Name: Last name myemail@email.com") and "General Resources".

Single Goal Dashboard

The single-goal dashboard adds further detail to the tasks the user has to complete. It allows the user to add notes next to each task and maintain a progress tracker. It also includes relevant resources to provide the user with information if needed.

The image displays two screenshots of the Single Goal Dashboard for the goal "Buy a car".

- Screenshot 1:** Shows a "To-do list" with three items: 1. Find installment program, 2. Pick desired car, and 3. Put 10% of income per week towards car fund. Below this is a "Resources" section with links: 1. How to Save for a Car in College and 2. How to Pick Your First Car. At the bottom, there is a note: "Need help? Talk to our chatbot here" followed by a blue robot icon. On the right, there is a "Progress Trackers" section with three items: "Find installment plan" (with a progress bar at 0%), "Pick desired car" (with a progress bar at 0%), and "Put 10% of income per week towards car fund" (with a progress bar at 0%).
- Screenshot 2:** Shows the same "To-do list" and "Resources" as Screenshot 1. On the right, the "Progress Trackers" section shows updated progress: "Find installment plan" (0%), "Pick desired car" (0%), and "Put 10% of income per week towards car fund" (10%, with a progress bar showing a yellow segment).

Profile

From the profile, the user can change any of their personal information, change their goals, or retake the quiz.

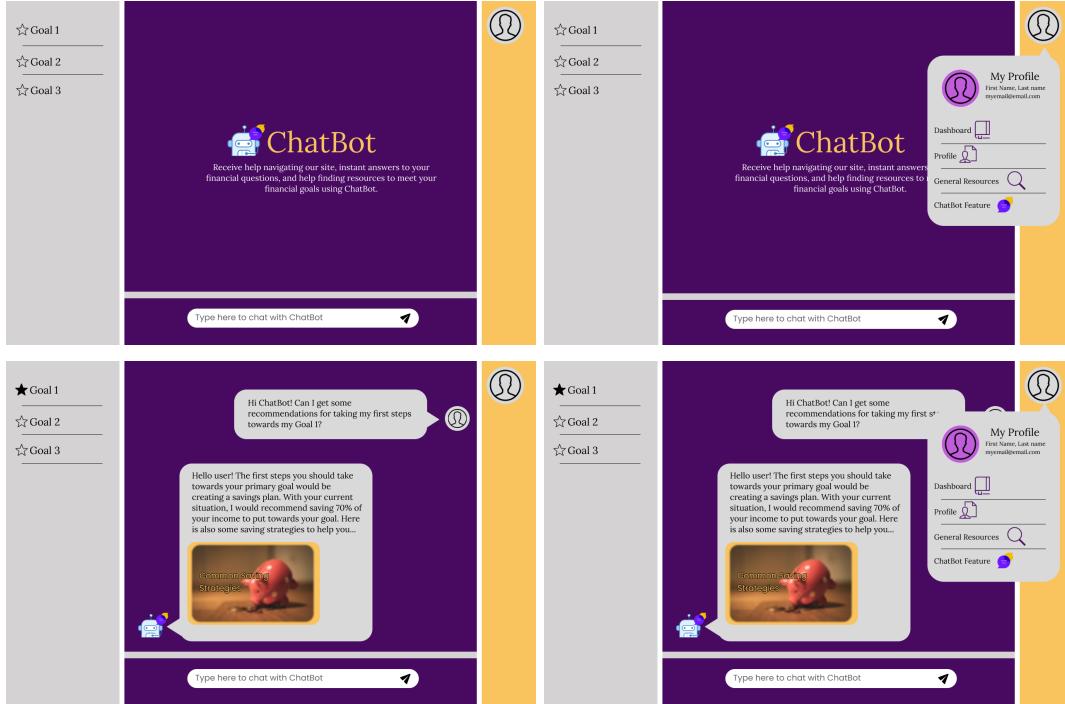


General Resources

The general resources page provides the user with goals that may interest them based on their personal information. Each goal has its own page introducing the goal, providing guiding steps and additional information. If the user wants to pursue the goal, they can directly save it to their dashboard from this page.

Chatbot

The chatbot is a feature provided to the user to use when they need extra assistance. They can directly ask for information on a specific goal by selecting the goal from the column on the left, or input text into the text box and wait for the bot's response.



Usage Scenario 1: Financial Quiz and Dashboard

The image displays four screenshots of the MyFinancesUW mobile application, illustrating a sequential quiz process:

- Screenshot 1: Tell Us About You!**

MyFinancesUW logo at the top left. The main title "Tell Us About You!" is centered. Below it, a subtitle says "Please answer the following questions related to your financial goals, click next to continue." Navigation buttons "**Back**" and "**Next →**" are at the bottom.
- Screenshot 2: When Is Your Birthday?**

The title "When Is Your Birthday?" is at the top. Below it is a date input field with three separate boxes for Month (1), Day (6), and Year (2002). A placeholder "Format: XX/XX/XXXX Month/Day/Year" is shown below the input. Navigation buttons "**Back**" and "**Next →**" are at the bottom.
- Screenshot 3: What Is Your Current Range of Income?**

The title "What Is Your Current Range of Income?" is at the top. Below it is a list of income ranges with radio buttons:
 - No current form of income
 - \$1-\$999
 - \$1,000-\$9,999
 - \$10,000-\$19,999
 - \$20,000-\$49,999
 - \$50,000-74,999
 - \$75,000-\$99,999
 - \$100,000-\$249,999
 - \$250,000+A progress bar at the bottom shows approximately 25% completion. Navigation buttons "**Back**" and "**Next →**" are at the bottom.
- Screenshot 4: What Does Your Money Go Towards?**

The title "What Does Your Money Go Towards?" is at the top. Below it, a subtitle says "Select all that apply." There is a search bar labeled "Search". Under "Common Responses:", there are several categories with colored buttons:
 - Food (yellow)
 - Clothes (light blue)
 - Bills (orange)
 - Travel (yellow)
 - Rent (light blue)
 - Taxes (grey)
 - Tuition (light blue)A progress bar at the bottom shows approximately 25% completion. Navigation buttons "**Back**" and "**Next →**" are at the bottom.

The image displays a sequence of six screenshots illustrating the user interface of a financial management application:

- Rank Your Current Money Goals!**: A quiz page where users rank their goals. The user has listed three goals: "Buy a car", "Plan student loan repayment", and "Financial independence from parents". A search bar at the top right shows previous entries: "Buy a car", "Plan student loan repayment", "Financial Independence", "Pay rent and bills", "Save money to buy a house", and "Learn to budget income". A "Submit" button is at the bottom right.
- Thank You!**: A confirmation page featuring a large dollar sign icon. It says "Click next to proceed to your dashboard." and includes a "Next →" button.
- Dashboard**: A summary page showing "Top Priority Goals" (Buy a car, Plan student loan repayment, Financial independence from parents), a "Click to access goal pages" section with thumbnails for Goal 1 (car), Goal 2 (piggy bank), and Goal 3 (hand holding card), and a sidebar with "Goal 1", "Goal 2", and "Goal 3" sections.
- Goal 1**: A detailed view for the "Buy a Car" goal. It includes a "To-do list" (Find installment program, Create a resume, Apply for jobs, Put \$20 a week towards car fund), a "Resources" section (How to Save for a Car in College, Top 10 Tips for a Strong Resume), and a "Progress Trackers" section showing progress for "Curves Installment Plan", "Create a Resume", "Created Resume", "Find a job", "Applied to F&B job", and "Put \$20 a week towards car fund".
- Goal 1**: Another view of the "Buy a Car" goal page, identical to the one above but likely a different screenshot or a refresh.
- Profile**: A user profile page showing basic information: First Name, Last Name, Email Address (gperez@uw.edu), Birthday (01/06/2002), Income Range (No current income), and a "Edit Information" button.

Upon onboarding, the website navigates the user to a quiz page where they are asked about their birth date, income, source of spending, and goals. The quiz will allow our website to provide the user with a customized dashboard that they can navigate to follow the quiz. The dashboard gives a brief overview of the user's goals and current to-dos associated with each goal. When the user clicks on a goal, they are provided with resources tailored to their specific goal and demographic information, as well as a progress tracker and to-dos. The profile contains basic information associated with the user's account.

Usage Scenario 2: Resources for Users

General Resources

Search for resources

Recommended Goals For You

- How to Build Your Resume
- Mortgage Payment Plans
- Common Saving Strategies To Buy Your First Car
- Credit Scores/Credit Card Management To Boost Your Credit Score

Misc. Resources

- Purchasing a Car
- Paying Off Your Car
- First Car Purchase? Save Money There
- Common Saving Strategies

Resource: Common Saving Strategies
By: [First Name, Last Name]

Introduction:
Saving strategies will help you allocate your money towards the proper institutions in order for your goals to be met. We can offer general statistics that will help guide you in determining the most appropriate ways of distributing your money, and how you should plan to progress over time.

Guiding Steps:
The following suggestions have been curated from various users who practice these savings strategies. The statistics, general to all groups of people, are based on averaging the income percentages that each user allocated to their savings.

- The most successful saving strategy among users involves following a budget for their expenses
- Most users achieved financial independence after saving 30% of their income for 8-10 years
- Many users felt most comfortable saving 20% of their income annually, experiencing only moderate restrictions to their spending

Sources Cited Below...

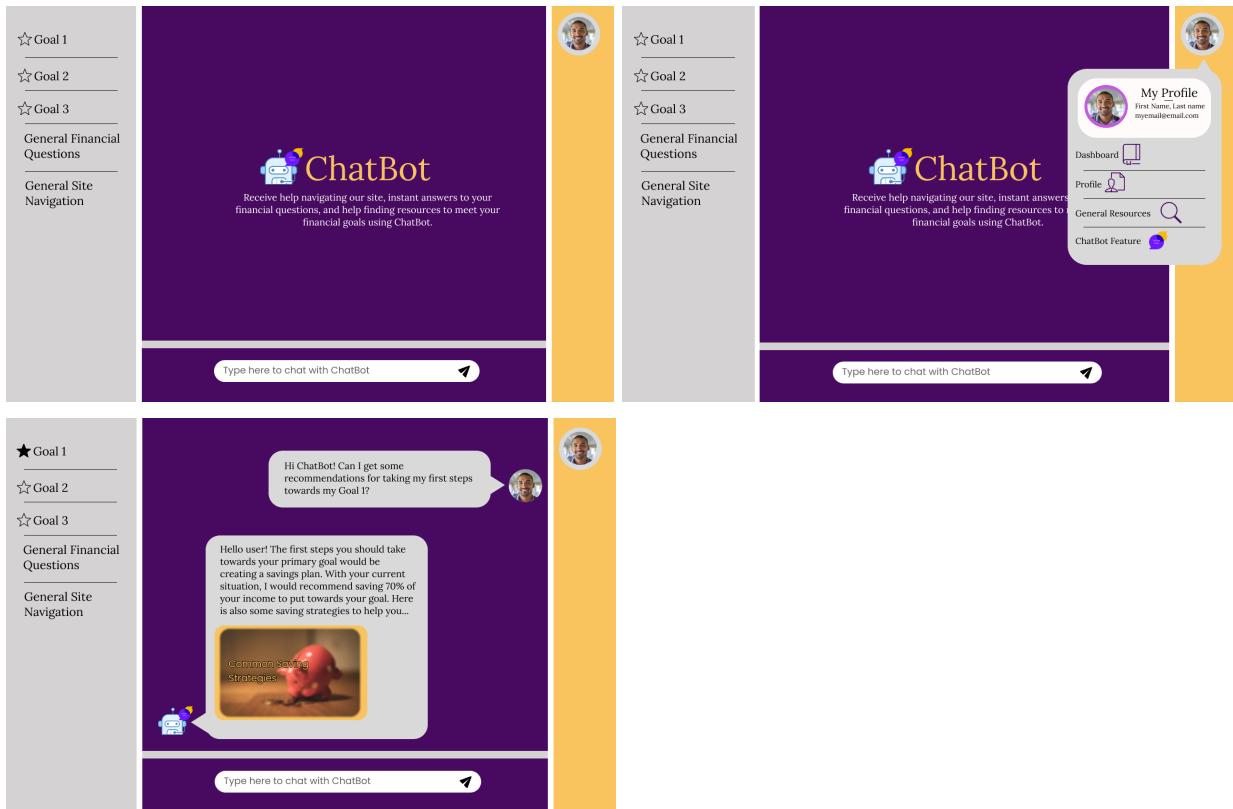
Commonly Used By:

- Age: 18-25
- Inc. Level: \$0-\$49,999
- Focus: General Savings

Save to Dashboard

The “General Resources” page has a search bar that enables users to search for resources, with recommendation goals and miscellaneous resources down below generated based on the user’s quiz response. Each resource page includes a title, an introduction, its author, guiding steps, and target groups. Each resource page is also meant to be tailored to the user, so the different resources that pop up will differ from user to user. The user’s profile photo is shown on the right and has a dropdown menu on click that allows the user to navigate to different pages.

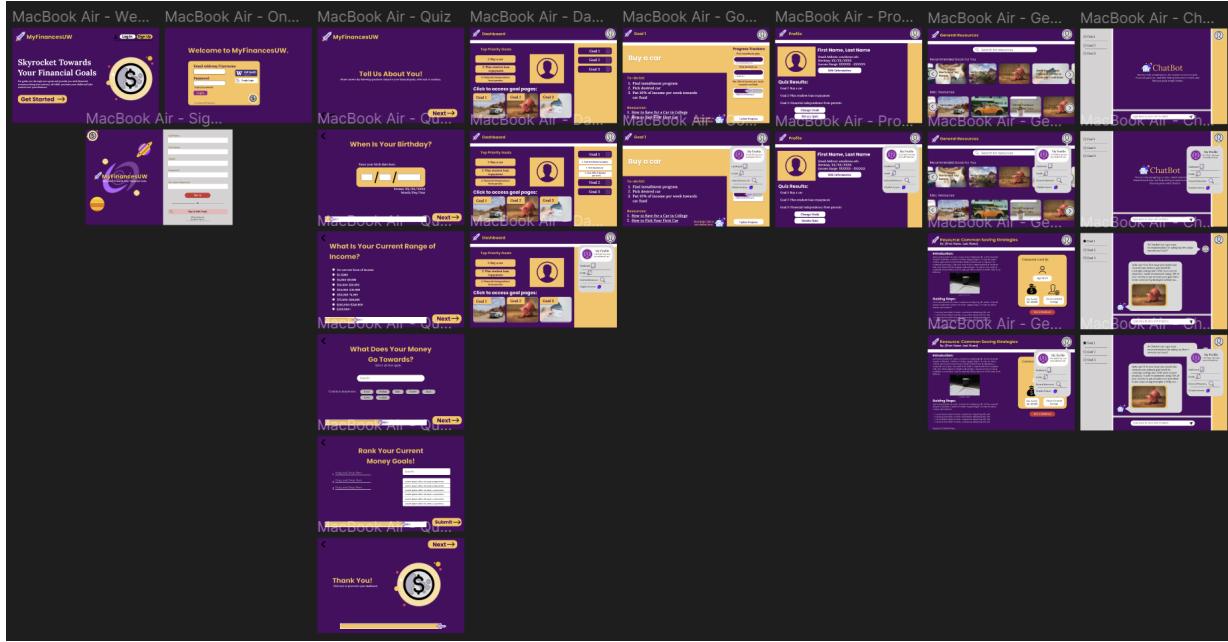
Usage Scenario 3: ChatBot (AI Program)



The user can use the AI-powered ChatBot feature to seek answers to their financial questions and find sources to reach financial goals. The star on the goal is highlighted when the goal is selected. The ChatBot also provides help with navigating the site. Users can use this function to gather direct information/answers to their financial questions or the ChatBot will guide them through various resources based on their concerns.

Interactive Prototype

- Website: MyFinancesUW
 - We used Figma to build the prototype for our website (please start using Flow 2 to view the prototype)
 - [https://www.figma.com/file/vibpJNgFAgtdumAt3WXCr7/MyFinancesUW%3A-Prototype-\(Community\)?type=design&node-id=0%3A1&t=AqUhUWwpeRnIIVGG-1](https://www.figma.com/file/vibpJNgFAgtdumAt3WXCr7/MyFinancesUW%3A-Prototype-(Community)?type=design&node-id=0%3A1&t=AqUhUWwpeRnIIVGG-1)
- 3D Model: Interaction Demo for MyFinances UW
 - <https://washington.zoom.us/rec/share/y5f4E4HVTewyMfl1DgFjmhimj2VZFURTunQuAZvLyFfArxE1L8tEK9y2MEOzoGh.SE34i6jw6pl22ffP?startTIme=1686003203000>
- **Full Display of Prototype:**



References

Marketing smarts for big ideas. Mailchimp. (2023).

https://mailchimp.com/guesswork-campaign/?ds_c=DEPT_AOC_Google_Search_US_EN_Brand_Acquire_Exact_MKAG_US&gclid=Cj0KCQjwj_ajBhCqARIsAA37s0wnkG0HE-5yw2Rrg-kzu07zVqXmazprAtpmVK6QPdf73RCj-eFBB7QaAnvaEALw_wcB&gclsrc=aw.ds

Buttignol, M. (n.d.). *Michela Buttignol illustrator.* michela buttignol illustrator.

<https://www.michelabuttignol.com/>

Appendix

Icons Used: <https://icons8.com/>

Images Used: <https://unsplash.com/>
