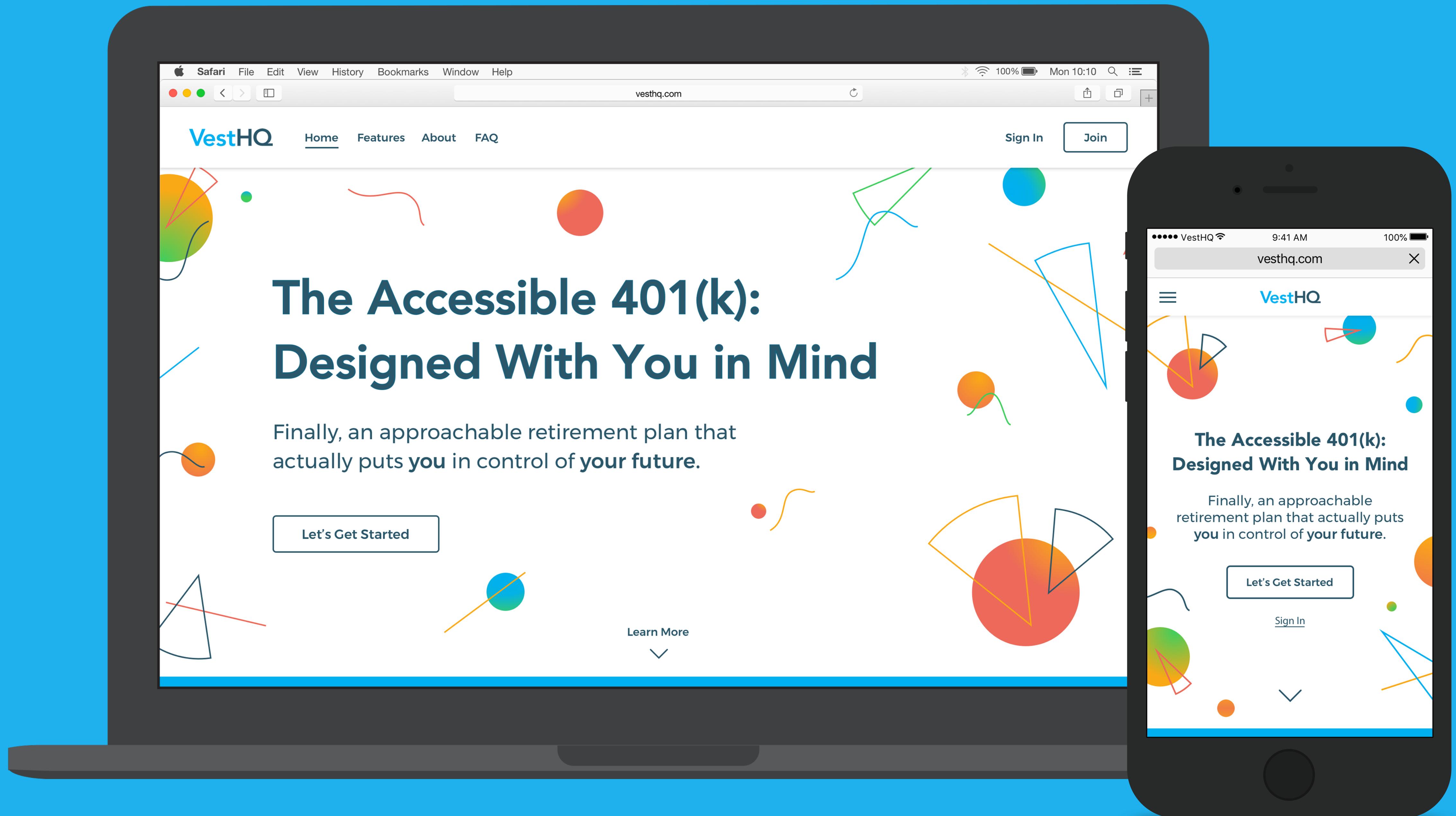


VestHQ

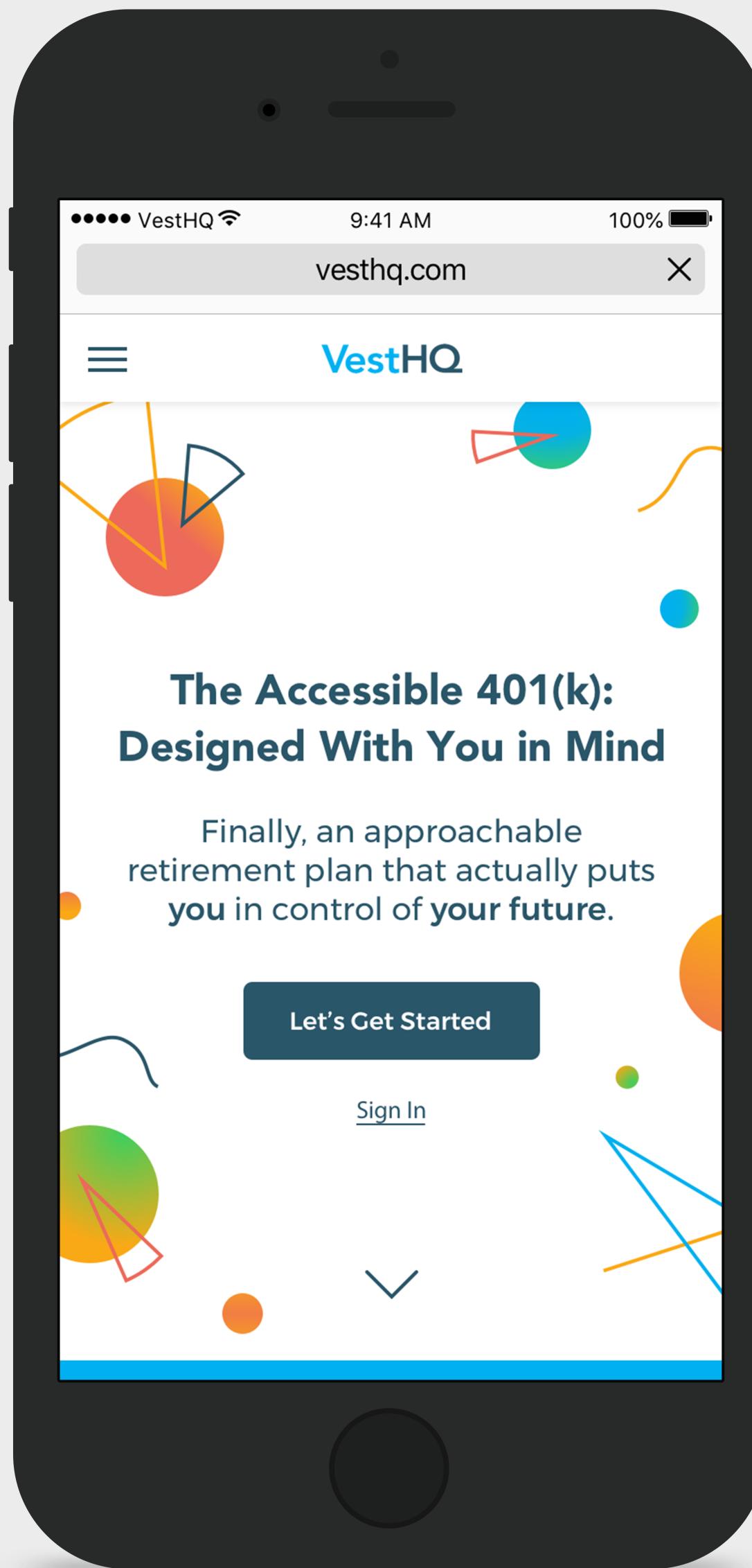
The Accessible 401(k)

Web App Mockup – Pitch Deck

— Summer 2017 —



'Let's Get Started' – Getting to know your risk profile



The image shows a smartphone displaying the first step of a risk quiz. The screen has a light blue header with the URL "vesthq.com/quiz". The main content asks: "How confident do you feel about retirement?". Below the question are five radio button options with corresponding emoji: "Confident 😊", "Comfortable 😃", "Neutral 😐", "Worried 😔", and "Panicked 😰". At the bottom is a "Next >" button.

The image shows a smartphone displaying the second step of a risk quiz. The screen has a light blue header with the URL "vesthq.com/quiz". The main content asks: "Adding up all your finances (cash, checking/saving accounts, mutual funds, stocks, etc.), what is the total value of your money?". Below the question is a text input field containing "\$ 5,000". At the bottom is a "Next >" button.

The image shows a smartphone displaying the third step of a risk quiz. The screen has a light blue header with the URL "vesthq.com/quiz". The main content asks: "When are you hoping to retire?". Below the question is a numeric input field containing "65". At the bottom is a numeric keypad grid:

1	2	3
4	5	6
7	8	9
PQRS	TUV	WXYZ
0		✖

Onboarding (cont.) –

Quiz helps users understand their financial position

VestHQ

If the market were to enter another recession over the next decade, how would you expect your 401(k) to turn out?

- Lose a lot of money
- Lose a little money
- Little to no loss or gain
- Make a little money
- Make more than market

Next >

VestHQ

If a friend or family member described you, they would say you are:

- Pretty cautious
- A risk-taker
- In the middle

Next >

VestHQ

Imagine you invested \$1000 over five years. Which outcome would you rather see?

- Have a chance to grow or lose 2%, ending with either \$1105 or \$904
- Have a chance to grow or lose 8%, ending with either \$1470 or \$660
- Have a chance to grow or lose 12%, ending with either \$1762 or \$527

Next >

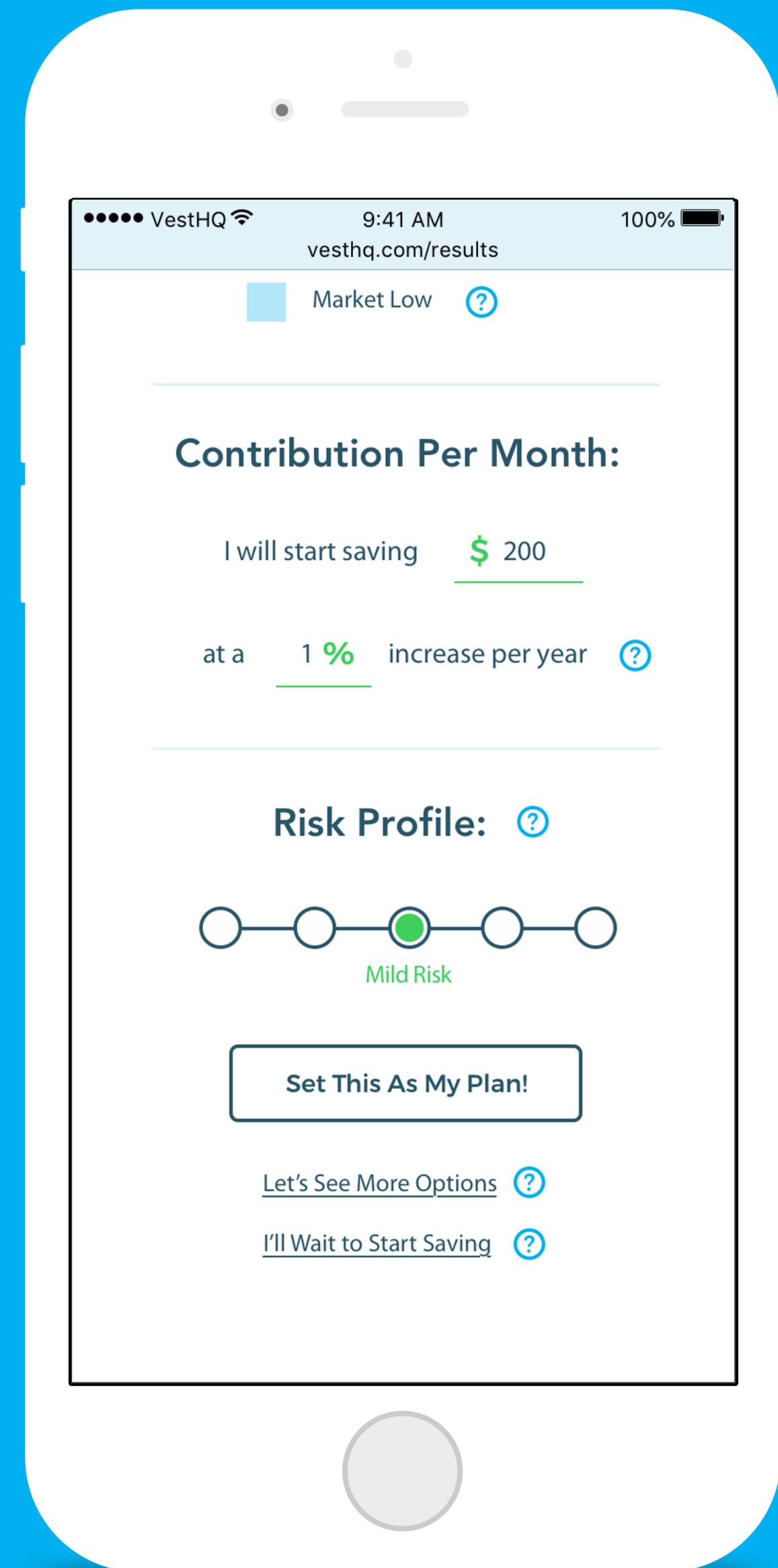
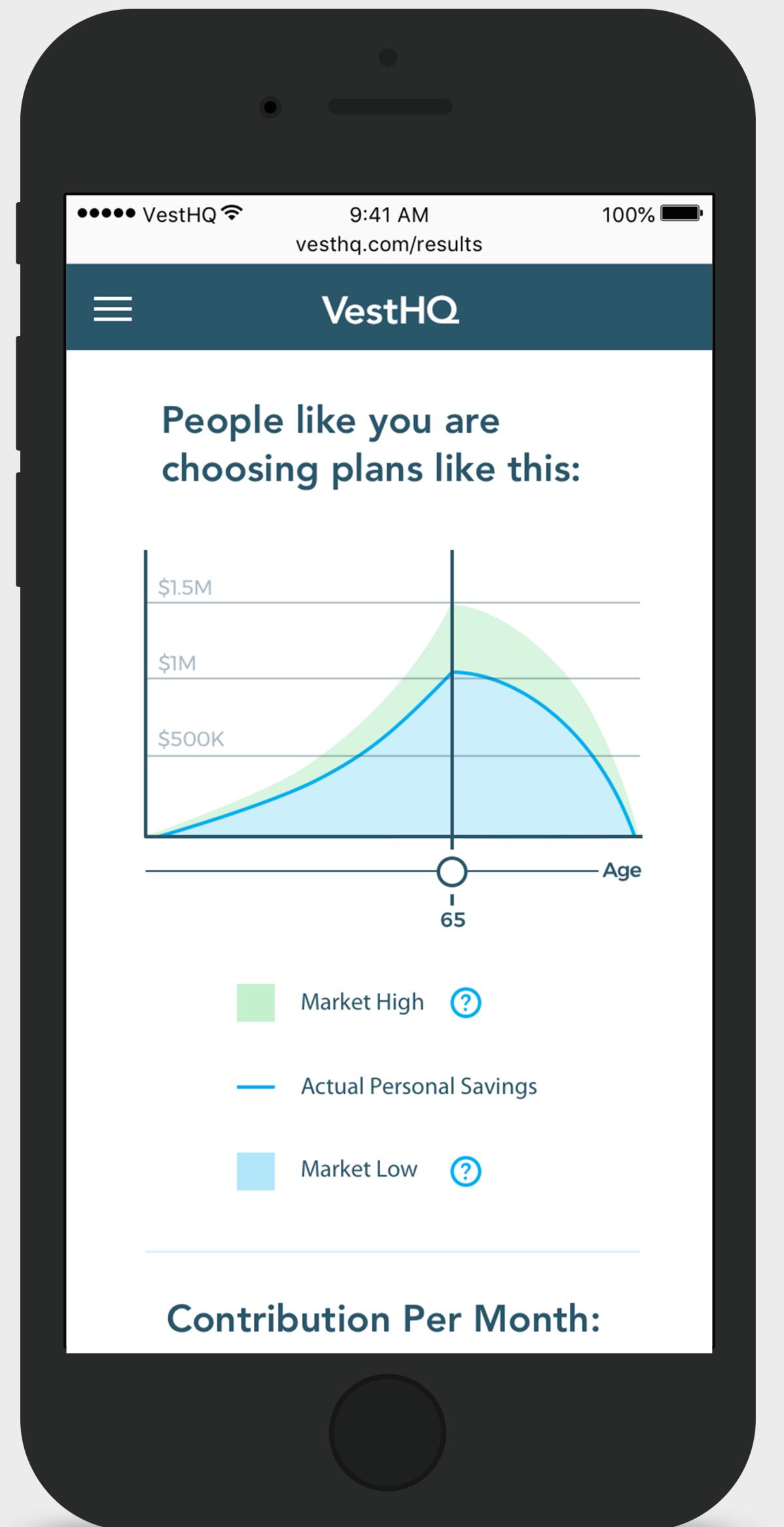
VestHQ

Which statement sounds closest to your career & salary goals?

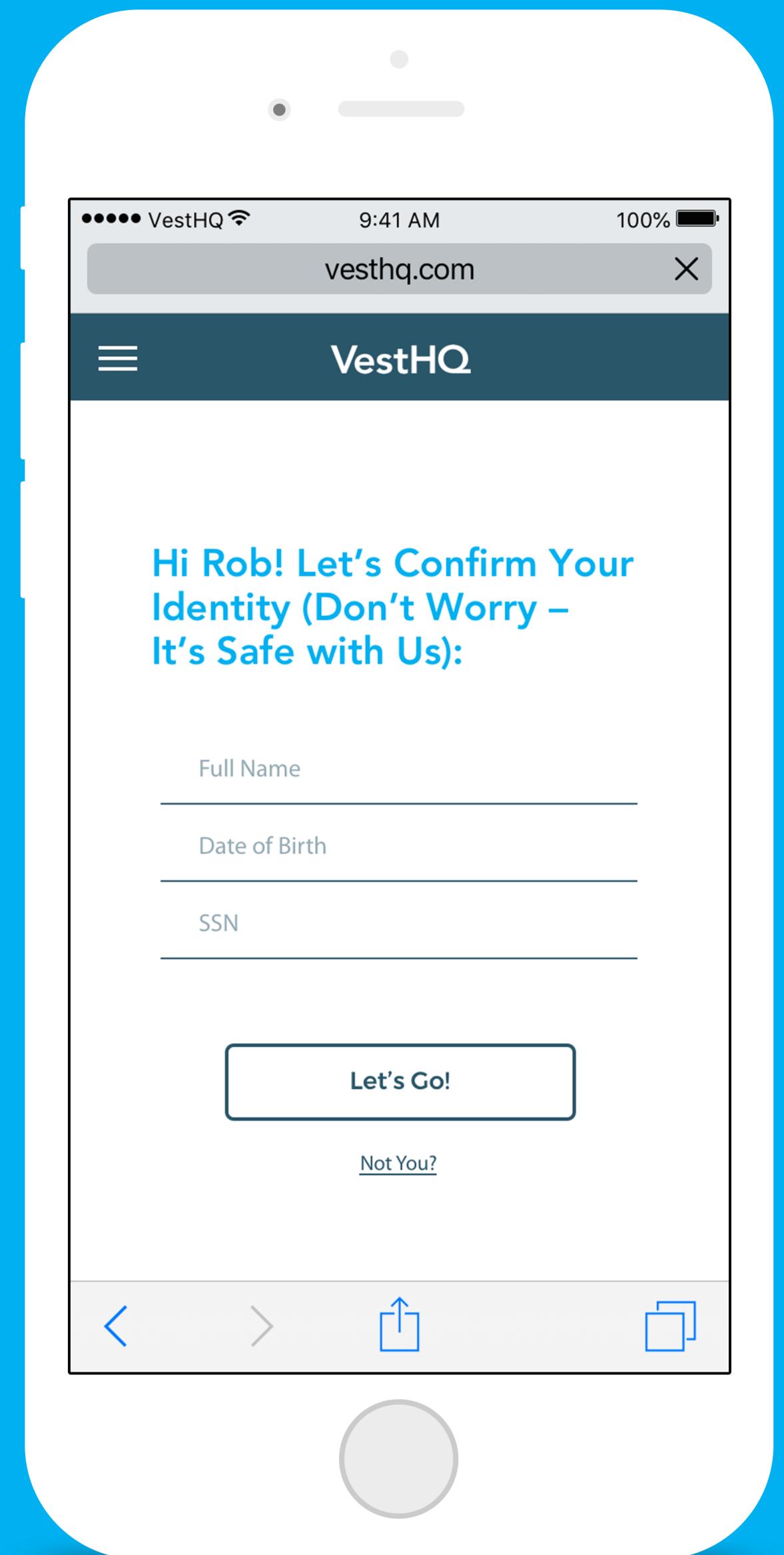
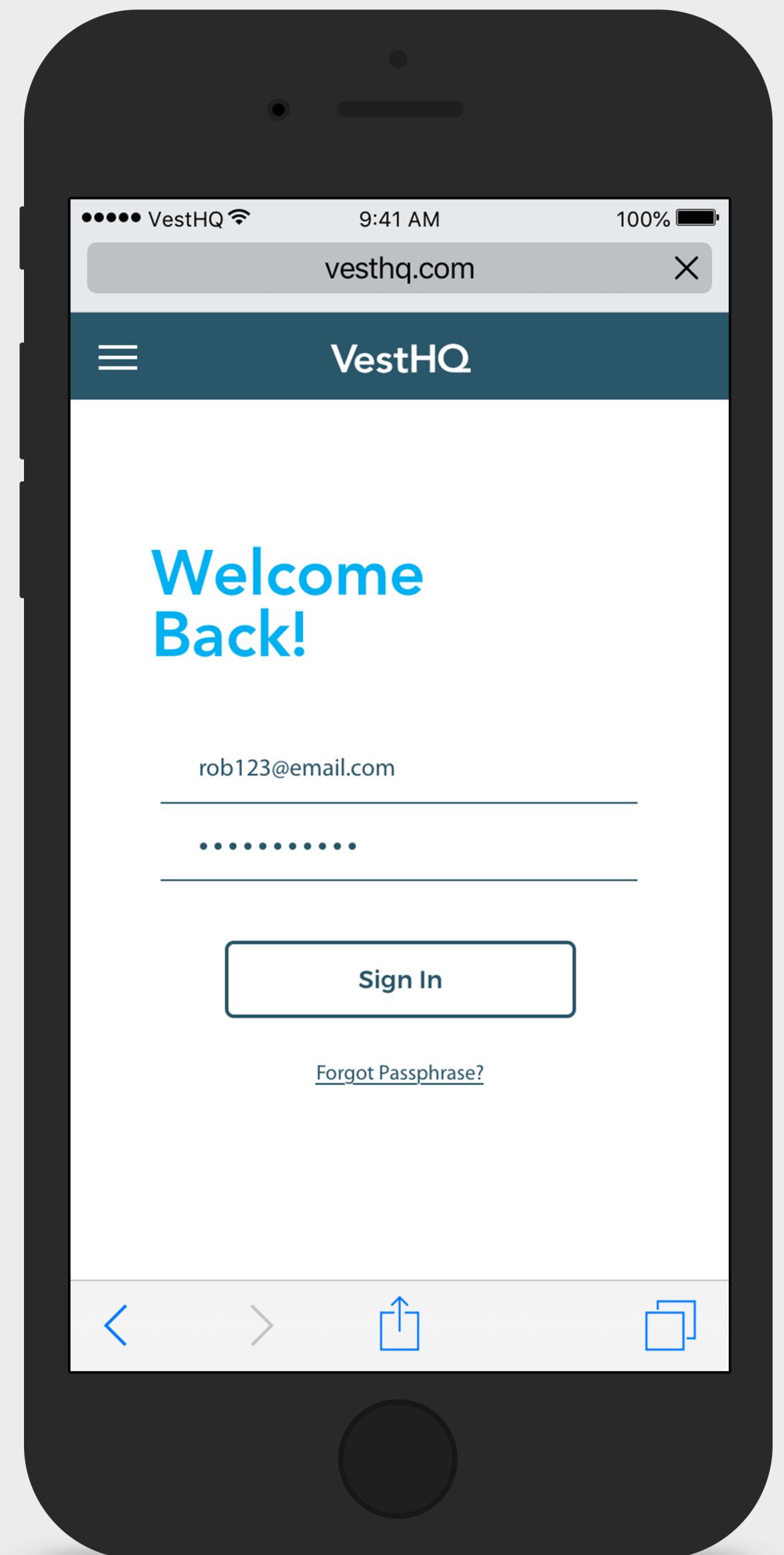
- Definitely: I'd pick & stick to a safe job with a steady salary
- Probably: I'd pick & stick to a safe job with a steady salary
- Not sure
- Probably: I'd pick a new, but less stable job if offered a 10% salary increase
- Definitely: I'd pick a new, but less stable job if offered a 10% salary increase.

Finish!

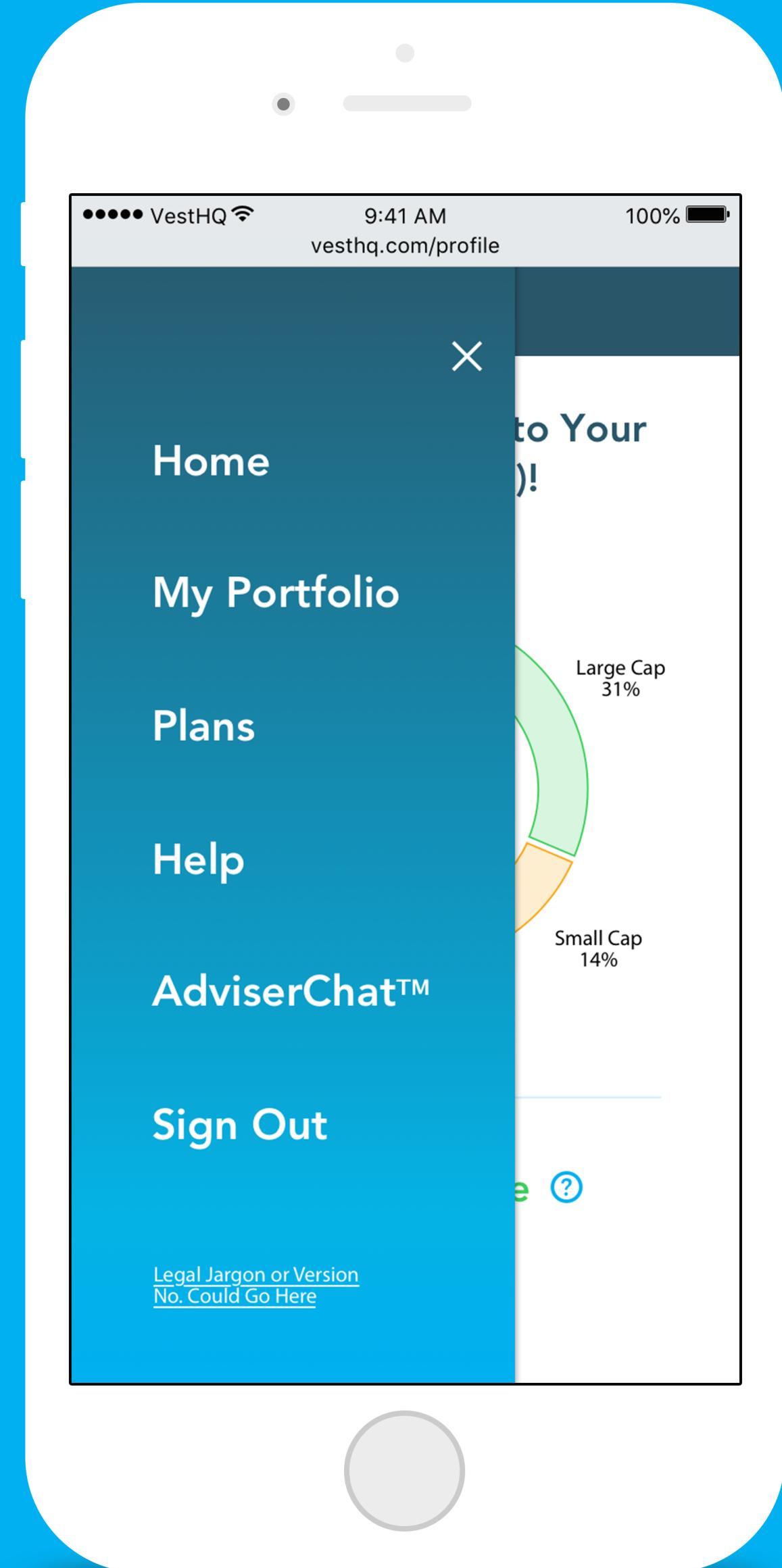
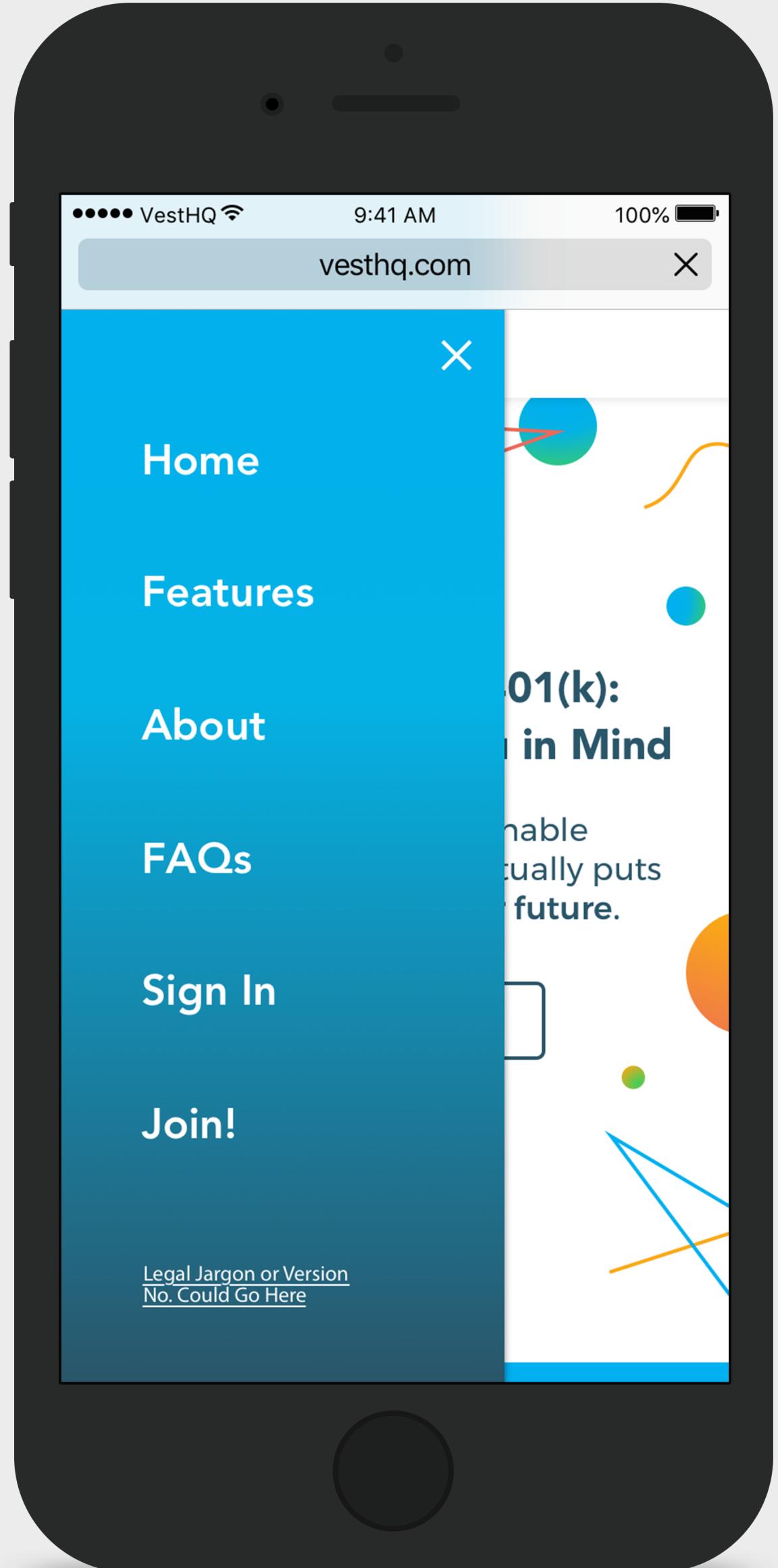
Quiz Results – Plan Selection

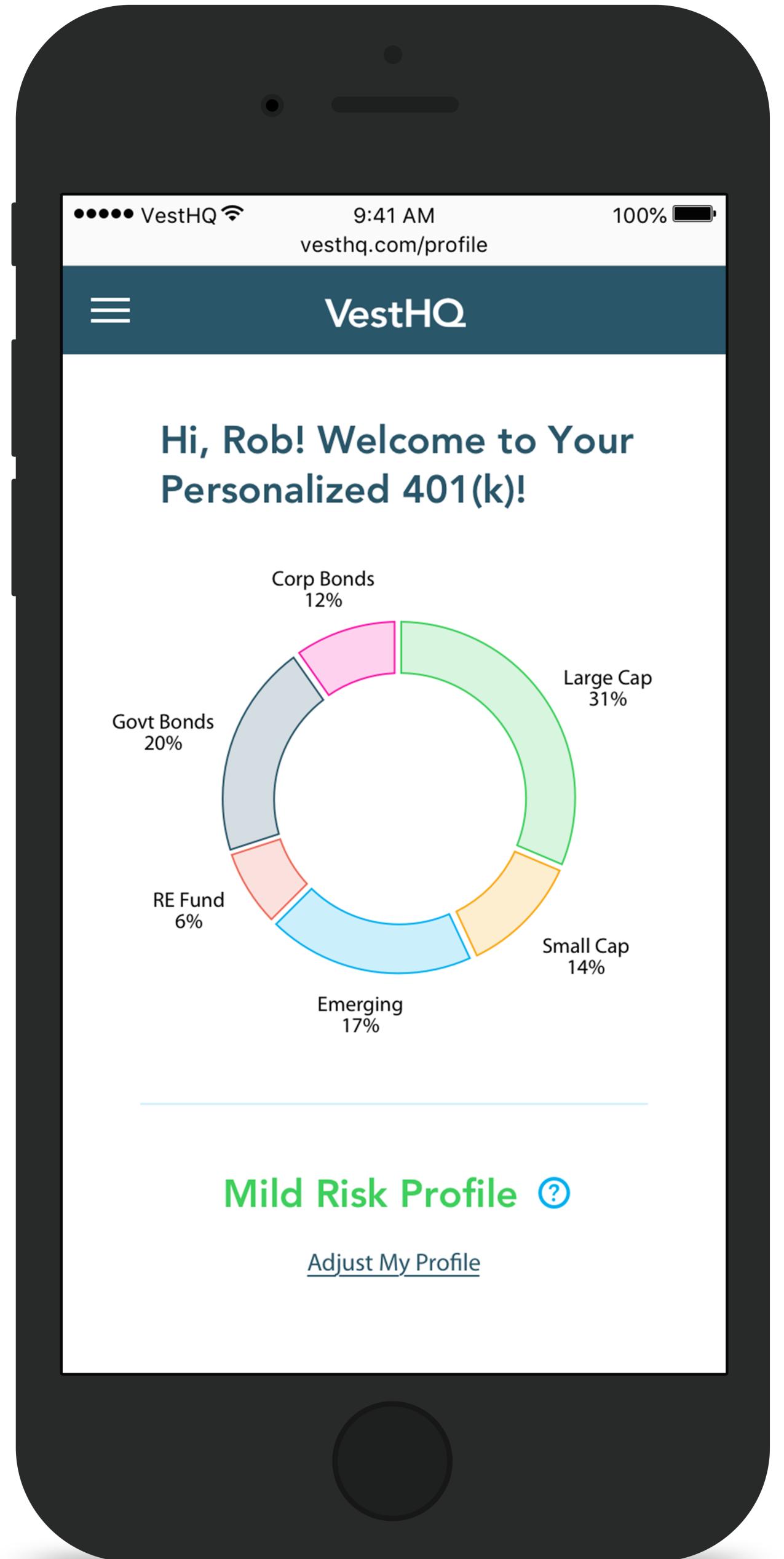


Sign In - Returning Users



Expanded Menu - New vs. User





User Profile – Gives user a snapshot of their chosen 401(k) plan, and the ability to change it

Thank You