

# Retirement Portal Brand Identity

## Brand Essence

**Audience:** American adults ages 50-70 planning for retirement or already retired, including those considering retiring overseas.

**Brand Personality:** Friendly, optimistic, trustworthy, and quietly adventurous. The brand should feel like a knowledgeable guide and encouraging companion — never intimidating, never flashy.

**Core Values:** - **Trust:** Clear, transparent, dependable - **Growth:** Financial security, personal growth, confidence - **Optimism:** A positive outlook on the future - **Adventure:** Freedom, possibility, new chapters (including retiring abroad)

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## Brand Positioning

### Positioning Statement:

A friendly, trustworthy retirement planning platform that helps people see the full picture, make confident decisions, and embrace the next chapter of life — wherever it may lead.

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## Logo Usage

- **Logo:** Existing nest egg logo (unchanged)
  - **Meaning:** Security, growth, and readiness for what comes next
  - **Usage Rules:**
    - Always maintain clear space around the logo (minimum = height of the egg)
    - Use full-color logo on light backgrounds
    - Use gold or white logo on dark backgrounds
    - Never distort, rotate, or add effects
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## Color System

### Primary Colors

- **Nest Egg Gold** #D6A84B
- Optimism, value, warmth
- Used for CTAs, highlights, progress indicators

- **Deep Navy** #1A2A40

- Trust, stability
- Used for headers, dark mode backgrounds

## Secondary / Neutral Colors

- **Eggshell White** #F9F8F6

- Calm, approachable background

- **Slate Gray** #4B5563

- Body text, secondary UI

- **Charcoal** #2A354A

- Cards and surfaces in dark mode
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## Light Mode Theme

- Background: Eggshell White
- Primary Text: Deep Navy
- Secondary Text: Slate Gray
- Buttons & Highlights: Nest Egg Gold
- Cards: White with subtle shadow

**Overall Feel:** Clean, calm, welcoming

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## Dark Mode Theme

- Background: Deep Navy
- Primary Text: Soft White #EDEDED
- Secondary Text: Muted Gray #B6BDC7
- Buttons & Highlights: Nest Egg Gold
- Cards: Charcoal

**Overall Feel:** Sophisticated, reassuring, modern

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# Typography

## Primary Typeface

**Inter** (or Poppins as an alternative) - Friendly, modern, highly readable

## Usage

- Headings: Semi-Bold / Bold
  - Body Text: Regular
  - Data / Tables (optional): Fira Mono
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# Voice & Tone

**Voice:** Supportive, clear, optimistic

**Tone Guidelines:** - Speak plainly, avoid jargon - Encourage confidence - Focus on clarity and empowerment

**Examples:** - "See your options clearly" - "Plan with confidence" - "Your future, thoughtfully mapped"

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# Primary Tagline Options

**Recommended:**

**Plan with Clarity. Live with Confidence.**

Alternatives: - Your Future, Clearly Mapped - Smart Planning for Life's Next Chapter - Retirement Planning, Made Friendly - Confidence for What Comes Next

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# App-Level Sub-Taglines

- **Retirement Income Planner:** See what your retirement can really look like
  - **Retire Abroad:** Explore life beyond borders
  - **Social Security Optimizer:** Get the most from what you've earned
  - **Activity Budget Planner:** Plan the life you want to live
  - **Healthcare Cost Calculator:** Prepare for care with confidence
  - **Tax Impact Analyzer:** Understand today. Save tomorrow.
  - **Pension vs Lump Sum Analyzer:** Choose wisely, with clarity
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## UI Design Principles

- Consistency across all apps
  - Large, readable text
  - Clear actions and feedback
  - Calm layouts with breathing room
  - Light & Dark mode parity
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## Brand Feel in One Sentence

A trusted guide for a hopeful, adventurous, and well-planned retirement.

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## UI Theme Tokens (Light & Dark)

### CSS / Tailwind Design Tokens

```
:root {  
  --color-bg-light: #F9F8F6;  
  --color-bg-dark: #1A2A40;  
  --color-surface-light: #FFFFFF;  
  --color-surface-dark: #2A354A;  
  
  --color-primary: #D6A84B; /* Nest Egg Gold */  
  --color-text-primary-light: #1A2A40;  
  --color-text-secondary-light: #4B5563;  
  --color-text-primary-dark: #EDEDED;  
  --color-text-secondary-dark: #B6BDC7;  
}
```

**Buttons** - Primary: Gold background, dark navy text - Hover: Slight darken gold - Secondary: Outline gold, transparent fill

**Cards** - Light: White surface, soft shadow - Dark: Charcoal surface, subtle border

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## Homepage Copy (Brand-Aligned)

### Hero Section

**Headline:** Plan with Clarity. Live with Confidence.

**Subheadline:** A friendly, powerful set of tools to help you plan retirement, explore life abroad, and confidently navigate what comes next.

**Primary CTA:** Get Started

**Secondary CTA:** Explore the Tools

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## Value Propositions

### See the Big Picture

Understand income, expenses, healthcare, taxes, and lifestyle — all in one place.

### Make Confident Decisions

Compare scenarios, optimize choices, and see how today's decisions shape tomorrow.

### Embrace What's Next

Whether staying close to home or retiring abroad, plan for the life you actually want.

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## App Ecosystem Copy

**One Portal. Every Retirement Question Answered.** From income planning to healthcare costs to retiring overseas, each tool works together — so nothing is overlooked.

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## Tagline Refinement System

### Primary Brand Tagline (Recommended)

Plan with Clarity. Live with Confidence.

### Short Version (UI / Mobile)

Plan Clearly. Live Confidently.

### Retire Abroad Variant

Plan with Confidence — Anywhere Life Takes You.

### Emotional Close

Because your next chapter should feel exciting, not uncertain.

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## App-Specific Micro-Taglines (Refined)

- **Retirement Income Planner:** Your income, clearly mapped
  - **Retire Abroad:** Your life — anywhere
  - **Social Security Optimizer:** Make the most of what you earned
  - **Activity Budget Planner:** Budget for the life you want
  - **Healthcare Cost Calculator:** Plan for care with clarity
  - **Tax Impact Analyzer:** Understand the impact before it hits
  - **Pension vs Lump Sum Analyzer:** Choose with confidence
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## Exportable Brand Guide Structure

**Section 1:** Brand Purpose & Audience

**Section 2:** Core Values & Personality

**Section 3:** Logo Usage & Meaning

**Section 4:** Color & Typography

**Section 5:** Light & Dark UI Examples

**Section 6:** Voice, Tone & Copy Examples

**Section 7:** App Ecosystem Consistency Rules

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## Final Brand Statement

A friendly, trustworthy platform that helps people see clearly, plan confidently, and embrace an optimistic and adventurous retirement.

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*This brand system is designed to scale with future tools, mobile apps, and marketing without losing warmth or trust.*

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## Portal UI Mapping (Direct Application)

### Global Portal Header

- **Background:** Light mode = Eggshell White; Dark mode = Deep Navy
- **Logo:** Nest egg logo left-aligned, full color (light) / gold or white (dark)
- **Primary Nav:** Deep Navy text (light) / Soft White (dark)
- **Accent:** Active tab underline in Nest Egg Gold

### Portal Home – App Cards Grid

- **Card Surface:** White (light) / Charcoal (dark)
- **Card Title:** Inter Semi-Bold, Deep Navy / Soft White

- **Card Subtitle:** App micro-tagline (see below)
- **Primary Action:** Gold button “Open Tool”
- **Secondary Action:** Text link “Learn More” (Slate Gray / Muted Gray)

**Micro-taglines to display on cards:** - Income Planner — *Your income, clearly mapped* - Retire Abroad — *Your life — anywhere* - Social Security — *Make the most of what you earned* - Activity Budget — *Budget for the life you want* - Healthcare Costs — *Plan for care with clarity* - Tax Impact — *Understand the impact before it hits* - Pension vs Lump Sum — *Choose with confidence*

## Tables & Charts (All Apps)

- **Headers:** Semi-Bold, Deep Navy / Soft White
- **Row Striping:** Very subtle gray tint (light) / charcoal tint (dark)
- **Highlights:** Gold for best option, positive outcomes
- **Warnings:** Muted amber or slate — never red-heavy

## Primary CTAs (All Apps)

- Label examples: “Run Scenario”, “Compare Options”, “See My Plan”
  - Shape: Rounded (8–10px radius)
  - Size: Large enough for accessibility (50–70 age range)
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# App-by-App Branding Checklist

Use this checklist when updating each application:

## Visual Consistency

- [ ] Uses global color tokens (no hard-coded colors)
- [ ] Light & dark modes visually equivalent
- [ ] Primary buttons are Nest Egg Gold
- [ ] Card surfaces match brand specs

## Typography

- [ ] Inter (or approved alternative) applied
- [ ] Heading sizes consistent with portal
- [ ] Body text at least 16px
- [ ] Table text readable without zoom

## Language & Tone

- [ ] Uses friendly, plain language
- [ ] Avoids jargon or acronyms without explanation
- [ ] Encouraging microcopy (“You can adjust this later”)

## Structure & UX

- [ ] Clear page title + short description
- [ ] One primary action per screen
- [ ] Secondary actions visually de-emphasized
- [ ] Results framed as options, not judgments

## Trust Signals

- [ ] Assumptions clearly stated
  - [ ] Editable inputs always visible
  - [ ] No surprise calculations
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# Polished PDF Brand Guide Layout

## Cover Page

- Nest egg logo centered
- Tagline: **Plan with Clarity. Live with Confidence.**
- Soft background gradient (Eggshell → White or Navy → Charcoal)

## Page 1 – Brand Purpose

- Audience overview
- Why this platform exists
- Emotional positioning statement

## Page 2 – Core Values

- Trust
- Growth
- Optimism
- Adventure (Each with 1-sentence explanation and icon)

## Page 3 – Logo & Meaning

- Logo anatomy
- Clear space rules
- Light & dark usage examples

## Page 4 – Color System

### Light Mode Swatches

- **Eggshell White** #F9F8F6 – Primary background
- **Pure White** #FFFFFF – Cards & surfaces
- **Deep Navy** #1A2A40 – Headings & primary text

- **Slate Gray** #4B5563 – Secondary text
- **Nest Egg Gold** #D6A84B – CTAs, highlights, emphasis

(Displayed as horizontal color bars with hex labels beneath each swatch)

### **Dark Mode Swatches**

- **Deep Navy** #1A2A40 – Primary background
- **Charcoal** #2A354A – Cards & surfaces
- **Soft White** #EDEDED – Primary text
- **Muted Gray** #B6BDC7 – Secondary text
- **Nest Egg Gold** #D6A84B – CTAs, highlights, emphasis

(Displayed as horizontal color bars with hex labels beneath each swatch)

**Usage Note:** Nest Egg Gold remains identical in both modes to reinforce brand recognition and optimism.

## **Page 5 – Typography**

- Heading hierarchy
- Body text samples
- Data/table text example

## **Page 6 – Voice & Tone**

- Do / Don't examples
- Approved phrases
- Example UI copy

## **Page 7 – Taglines & Messaging**

- Primary tagline
- Variants
- App micro-taglines

## **Page 8 – UI Components**

- Buttons
- Cards
- Tables
- Charts

## **Page 9 – Portal & App Examples**

- Portal homepage layout
- Example app screen

## **Final Page – Brand Promise**

A trusted guide for a hopeful, adventurous, and well-planned retirement.

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*This layout is ready for export to a polished PDF using Figma, Canva, or InDesign.*