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)

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.

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

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

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

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

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

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"

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

Brand Feel in One Sentence

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

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

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.

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.

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.

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

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

Final Brand Statement

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

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

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)

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

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.

Visual Swatches in the PDF (Clarification)

Yes — the PDF **should absolutely include the actual colors**, not just hex codes. In the final PDF: - Each color appears as a **filled rectangle or circle swatch** - Hex code and color name appear directly below each swatch - Light and Dark palettes are shown **side-by-side** for instant comparison

This is standard practice for professional brand guides and is fully supported in Figma, Canva, InDesign, and even Google Slides before PDF export.

Iconography System

Icon Style Direction

- **Style:** Outline or light duotone (not filled)
- **Stroke:** Medium weight (consistent across sizes)
- **Corners:** Slightly rounded
- **Tone:** Friendly, calm, optimistic — never sharp or aggressive

Icons should feel *approachable and clear*, not technical or abstract.

Recommended Icon Libraries

Primary Recommendation: - **Lucide Icons** (clean, modern, friendly — excellent for web apps)

Alternatives: - Heroicons (Outline) - Phosphor Icons (Regular weight)

Core Brand Icons (Portal-Level)

Concept	Icon Suggestion
Planning	Compass / Map
Growth	Sprout / Trending Up
Trust	Shield Check
Optimism	Sunrise
Adventure	Globe / Airplane

App-Specific Icon Suggestions

- **Retirement Income Planner** → Line chart / Coins stack
- **Retire Abroad** → Globe / Map pin
- **Social Security Optimizer** → Shield with star / Check badge
- **Activity Budget Planner** → Calendar / Checklist
- **Healthcare Cost Calculator** → Heart pulse / Medical cross
- **Tax Impact Analyzer** → Document with percentage
- **Pension vs Lump Sum Analyzer** → Balance scale

Icon Usage Rules

- Use **Deep Navy** (light mode) or **Soft White** (dark mode) for default icons
- Use **Nest Egg Gold** for:
- Active states
- Key highlights
- Selected app cards
- Avoid multicolor icons
- Keep icon size consistent within sections

PDF Brand Guide – Icon Page Layout

Page Title: Iconography - Row 1: Core brand icons with labels - Row 2: App-specific icons with labels - Footer note: "Icons reinforce clarity, not decoration"

With color swatches and iconography included, this brand guide becomes fully visual and implementation-ready.