

Fundit

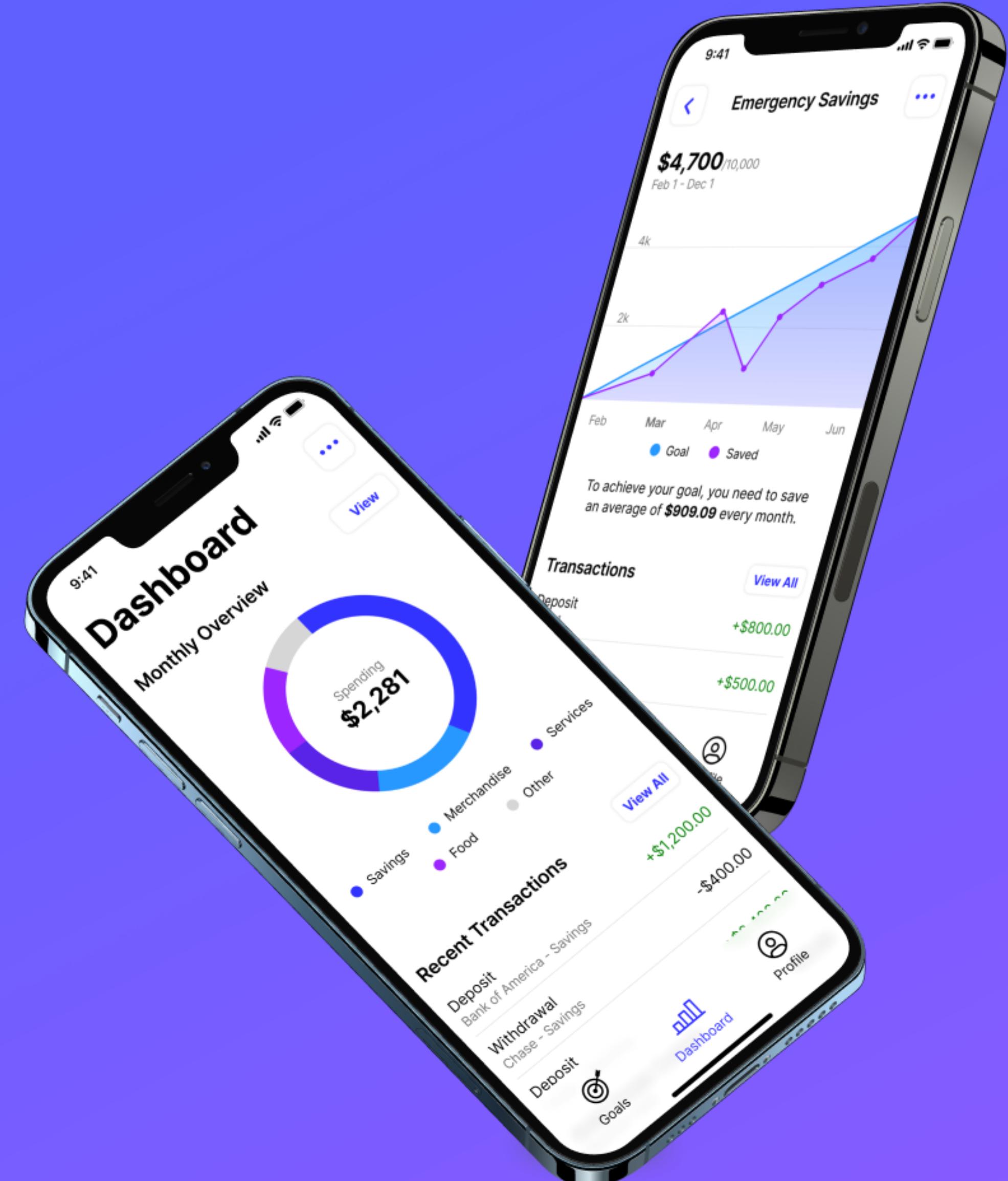
A money saving and personal finance app
by Jeremy Noel

Project Overview

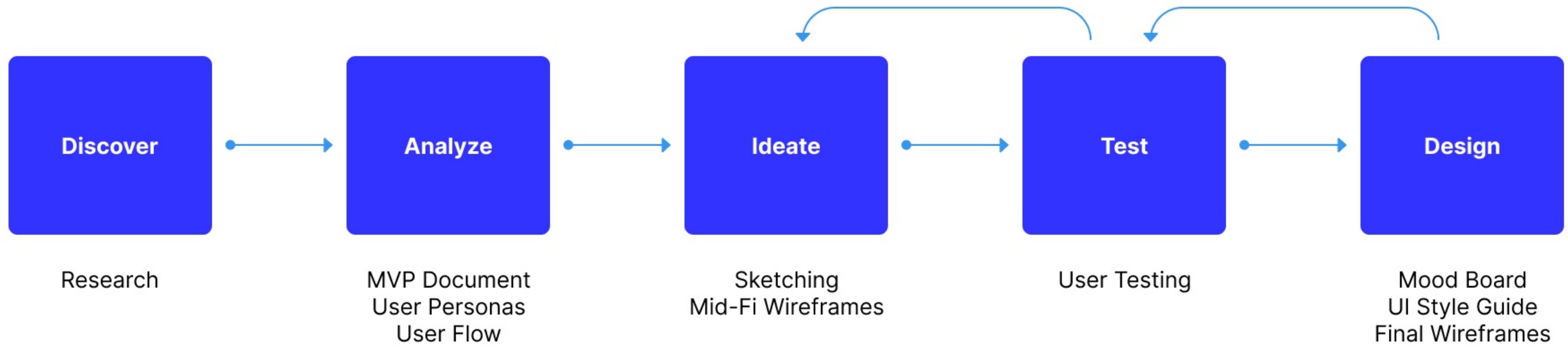
Fundit is a money saving application focused on helping people new to the world of finance achieve their goals and better manage their spending.

Role

For this project I served as the UX and UI designer.



UX Process



MVP

Objective

Fundit is a money saving application designed with a focus on users who are new to the world of finance. The app and brand, like most actual financial advisors, must convey simplicity, encouragement, reliability, and trustworthiness.

Job to be done

As a new user, I need to be able to create a profile, so that the financial advice I receive is personalized to me, my spending habits, and tailored to my goals.

As a money-saver, I need to be able to input information on the money I am receiving and spending (and on what), so that I can see an overview of my finances.

As a user, I want to see a dashboard of my finances clearly and visually, so that I can see how much I am spending on what at a glance.

As a user, I need to be able to tell the tool what my savings goal is and how long I have to reach it, so that I can save accordingly.

As a user, I want the money-saving tool I use to be motivational, so that I stay on track with my goals.

Feature Requirement

Sign up screens that collect basic information along with an option to connect other financial accounts for a more personalized experience.

In order to simplify the user experience, the application should automatically track purchases, deposits, and withdrawals to display them on an easy to follow dashboard.

A dashboard with a donut chart displaying monetary distribution, the ability to see recent transactions, and user-set budgets.

Goal creation screen with an interactive calculator based on total amount and time.

Friendly, but trustworthy, tone used throughout the application along with some gamification for encouragement.

User Personas



Jasmine Smith

22

Single

Recruiter

San Francisco, California

Psychology Degree

"I need to start being more considerate to my future self."

Bio

Jasmine is a first generation college graduate who has recently started her first salaried job as a recruiter. Now that she is getting older, she is realizing the importance of paying attention to her finances. While reluctant, she knows actions like building her emergency savings and keeping track of her spending habits will allow her to be more independent.

Goals

- Saving money
- Tracking expenses
- Better understanding of personal finance
- Financial independence

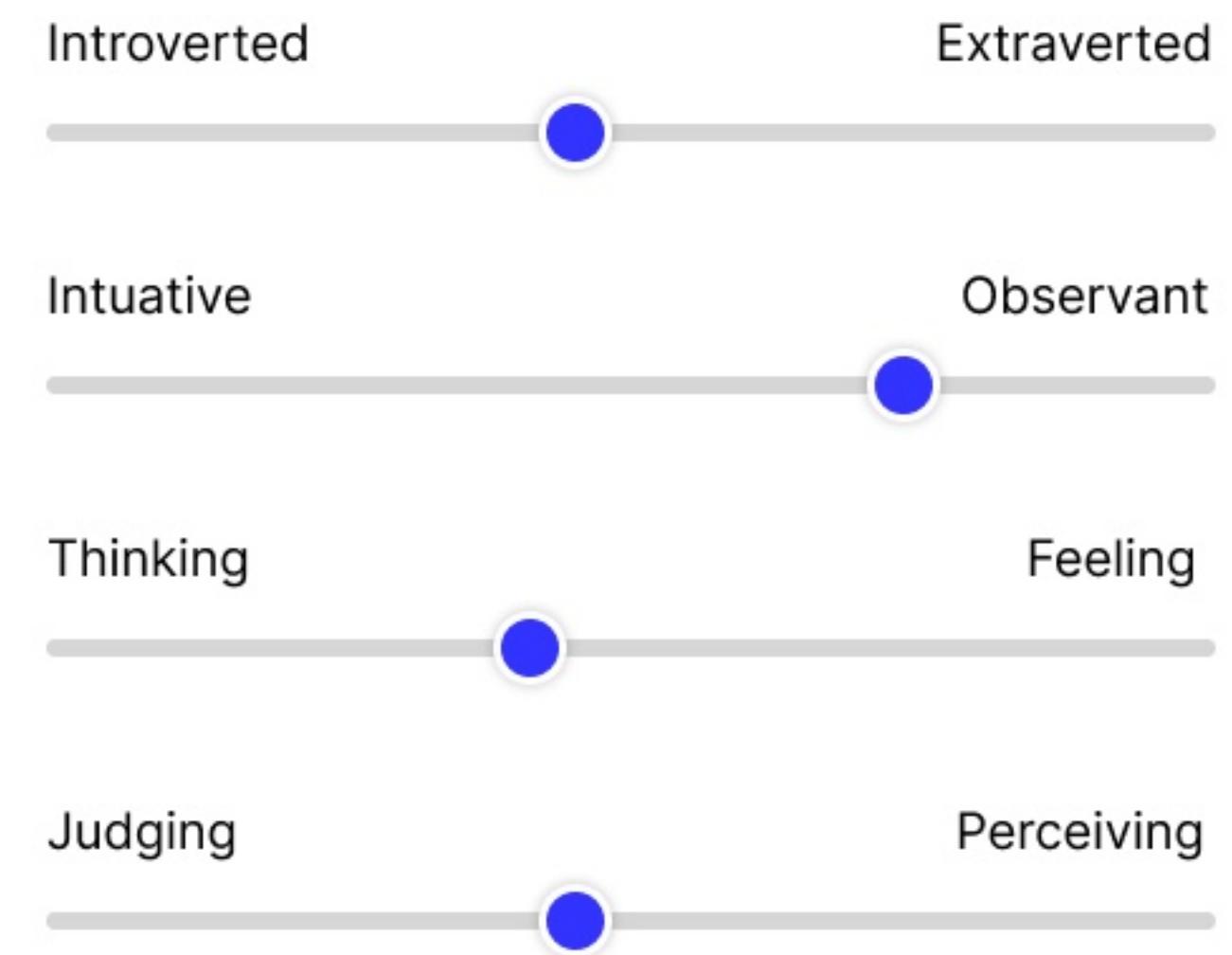
Frustrations

- Scattered financial data
- Information overload
- Family lacks financial literacy

Hobbies

- Traveling
- Biking
- Rock Climbing
- Volunteering

Personality





Richard Edwards

57

Married

Business Manager

Orlando, Florida

High School Diploma

"I wish I'd put more thought into saving money sooner."

Bio

Richard is a business manager for a popular restaurant in Orlando. He's been married for 30 years and has five children. Recently, his family has started pressuring him to think about retirement. While Richard knows it's almost time, he's concerned he won't be able to save enough money and doesn't want his kids to worry about him. They have offered to hire him a financial advisor, but he'd rather manage everything on his own.

Goals

- Saving goals automatically managed
- Clearly defined budgets
- Better organized finances

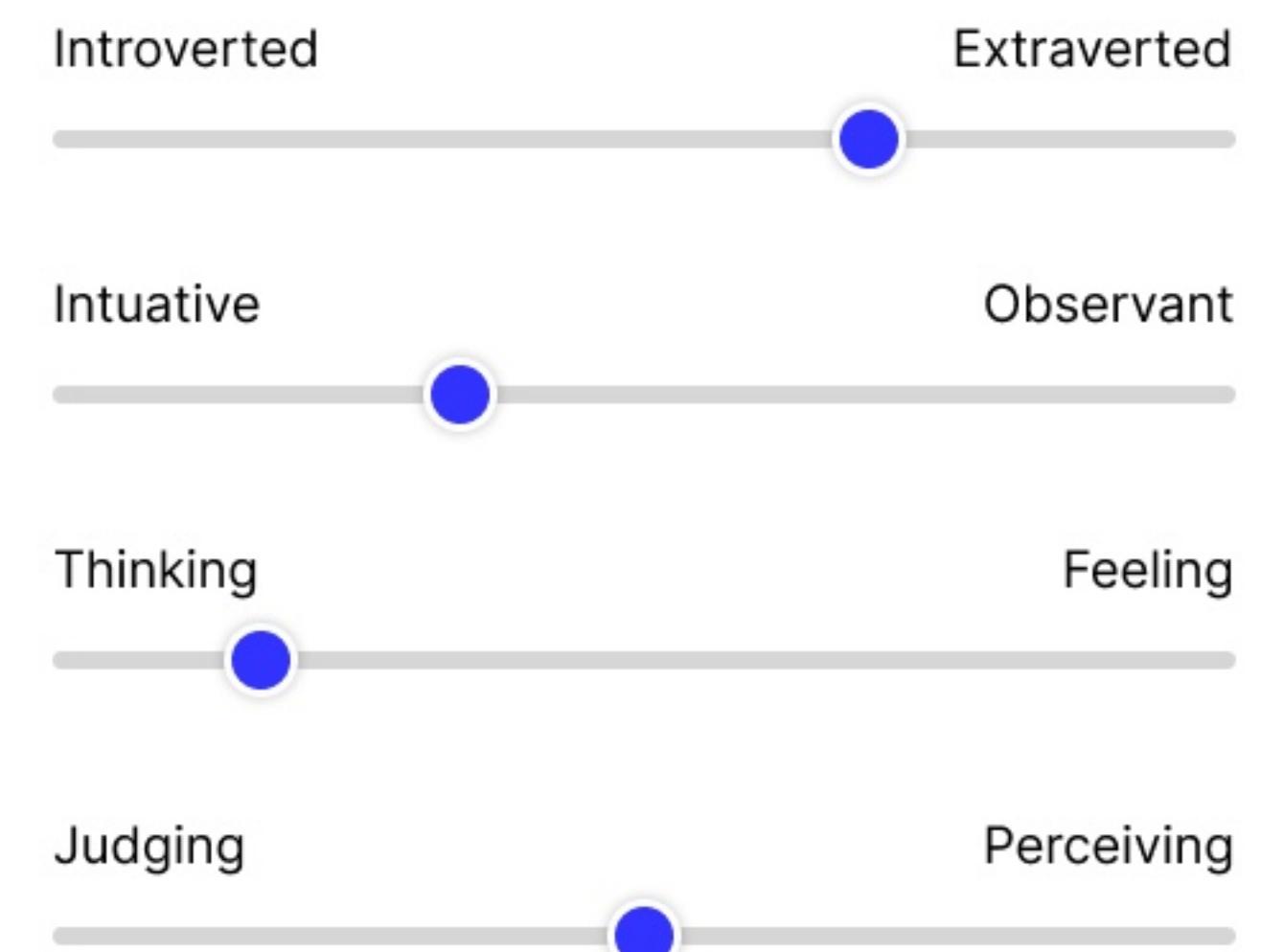
Frustrations

- Complicated applications
- Not enough time to think about saving
- Too many financial responsibilities

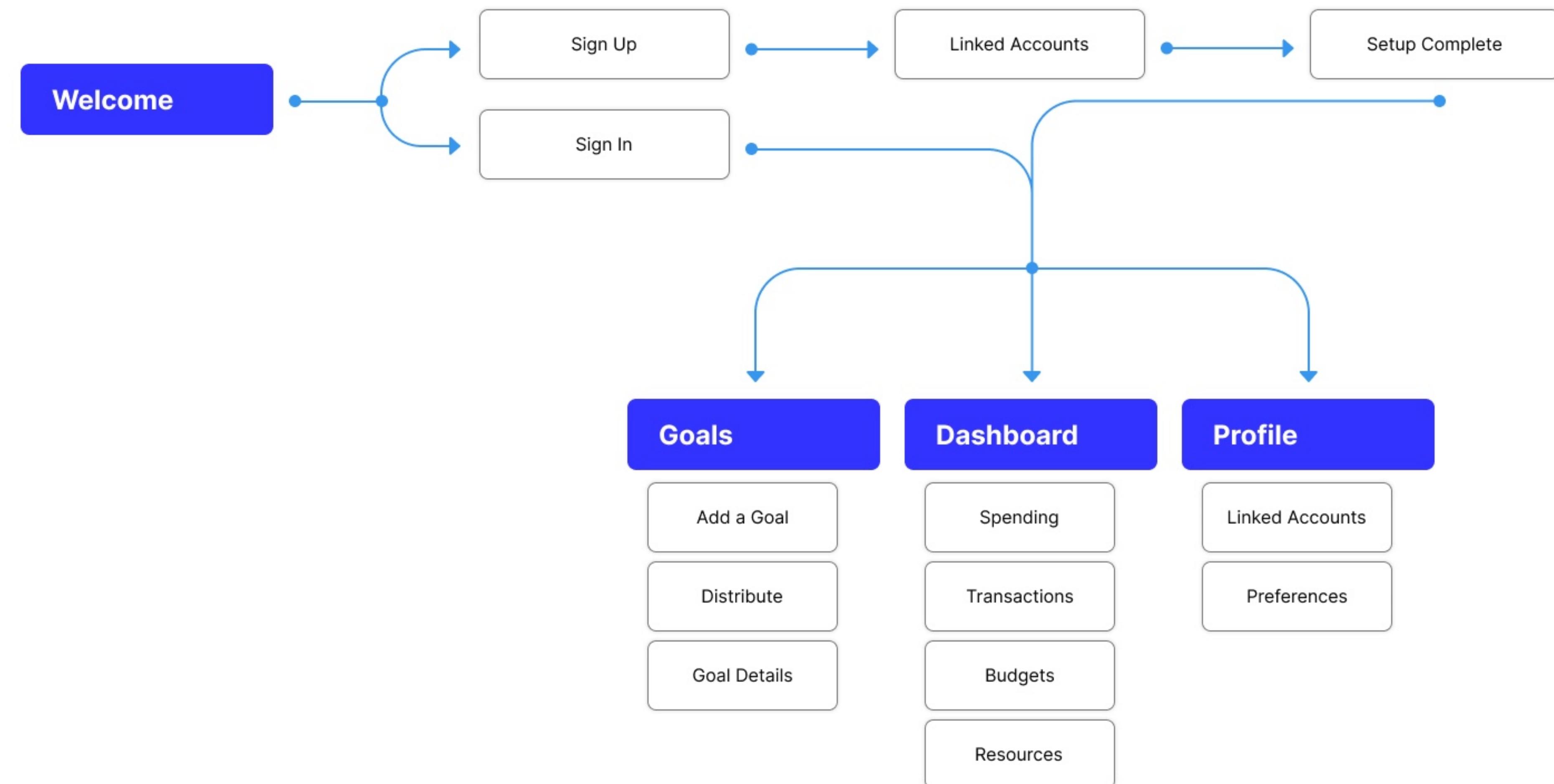
Hobbies

- Woodworking
- Camping
- Community Involvement

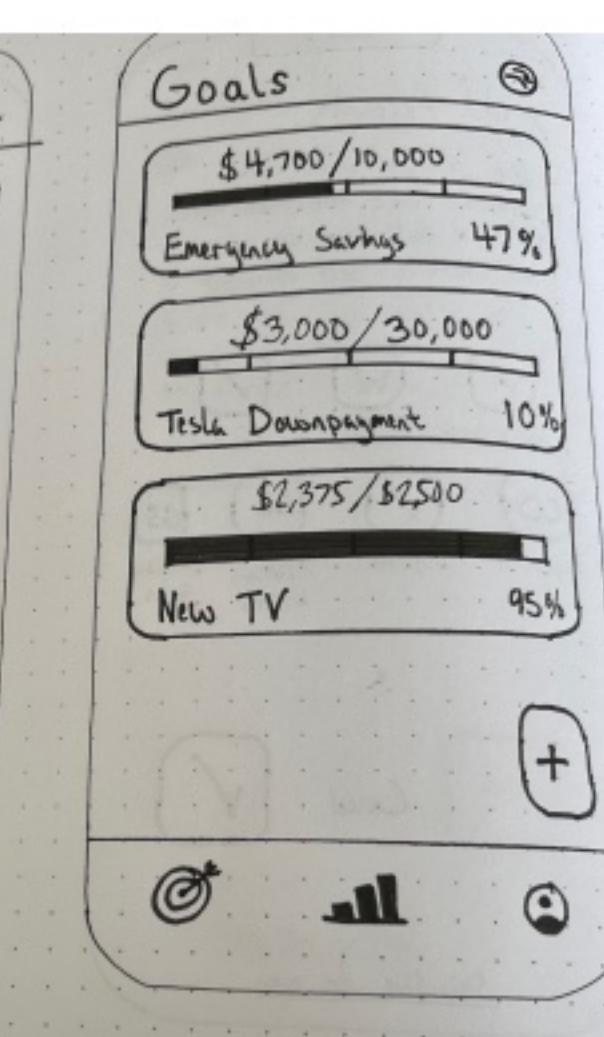
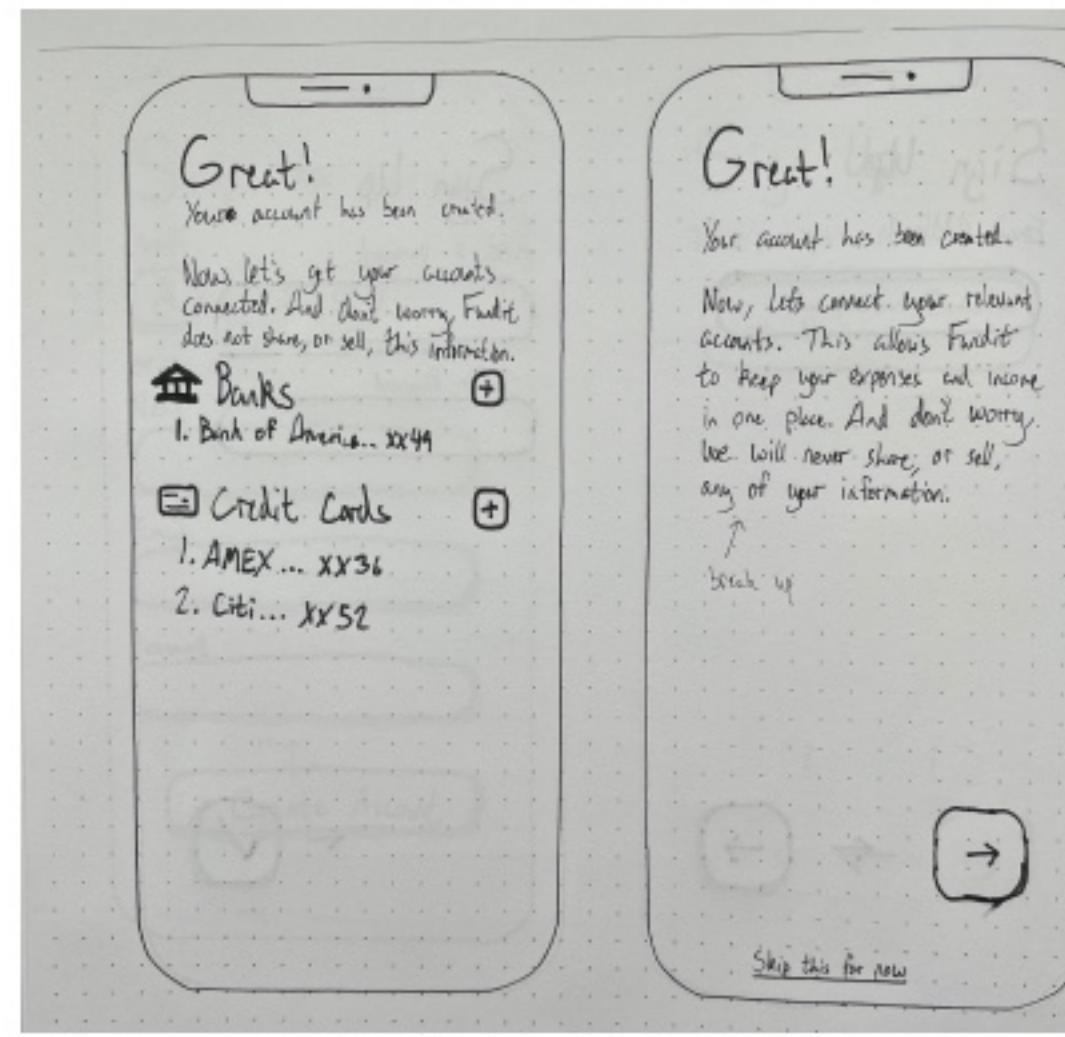
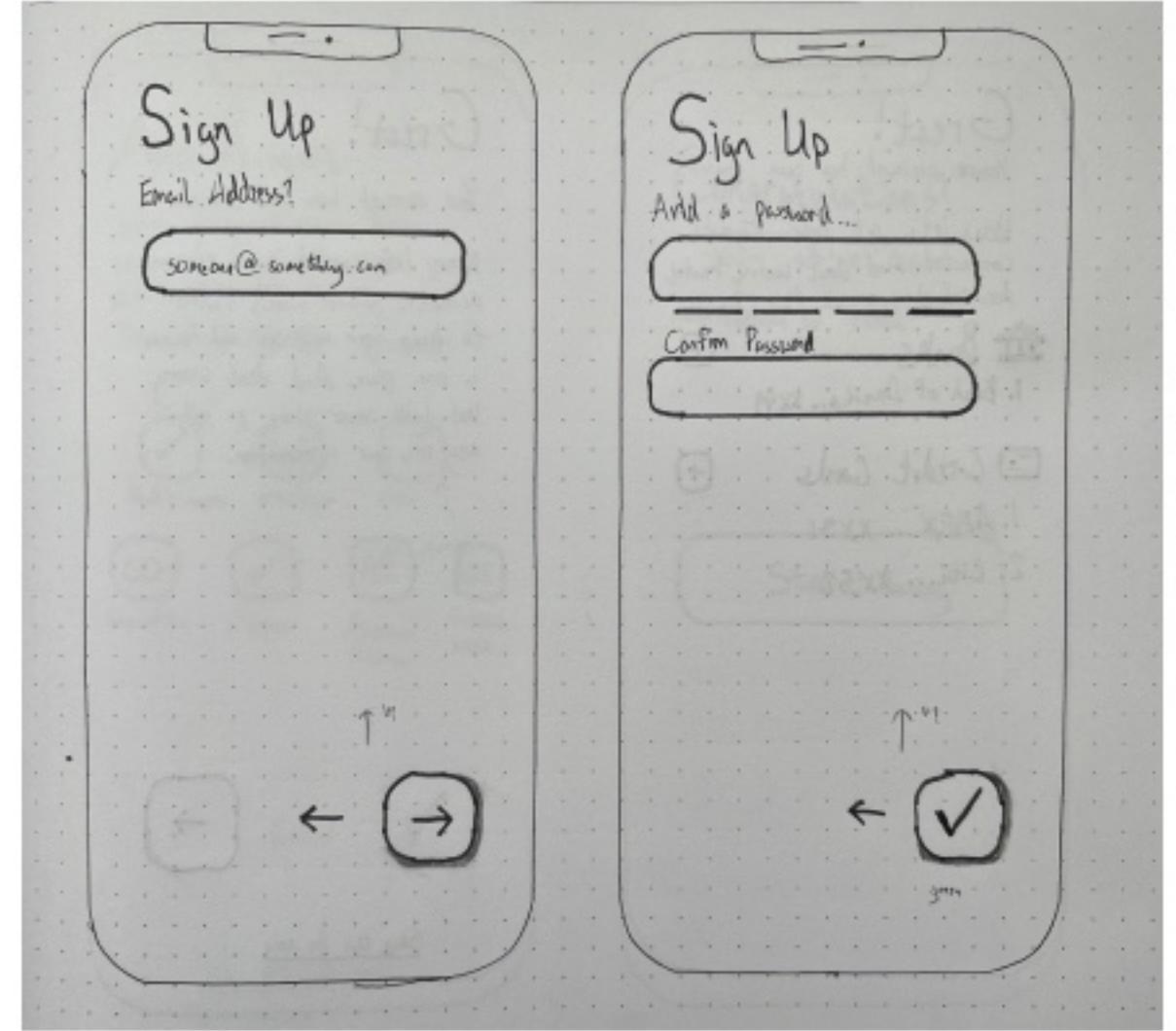
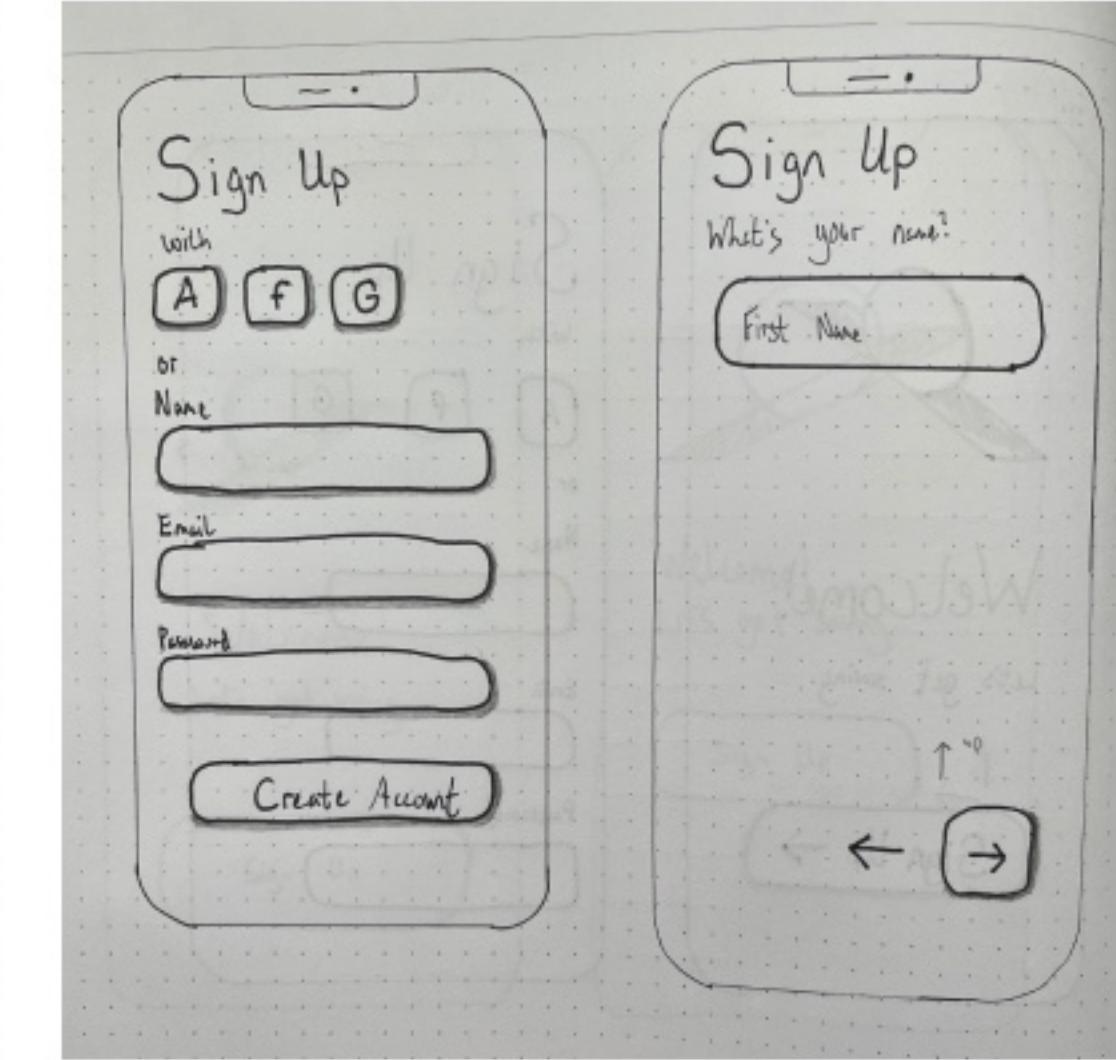
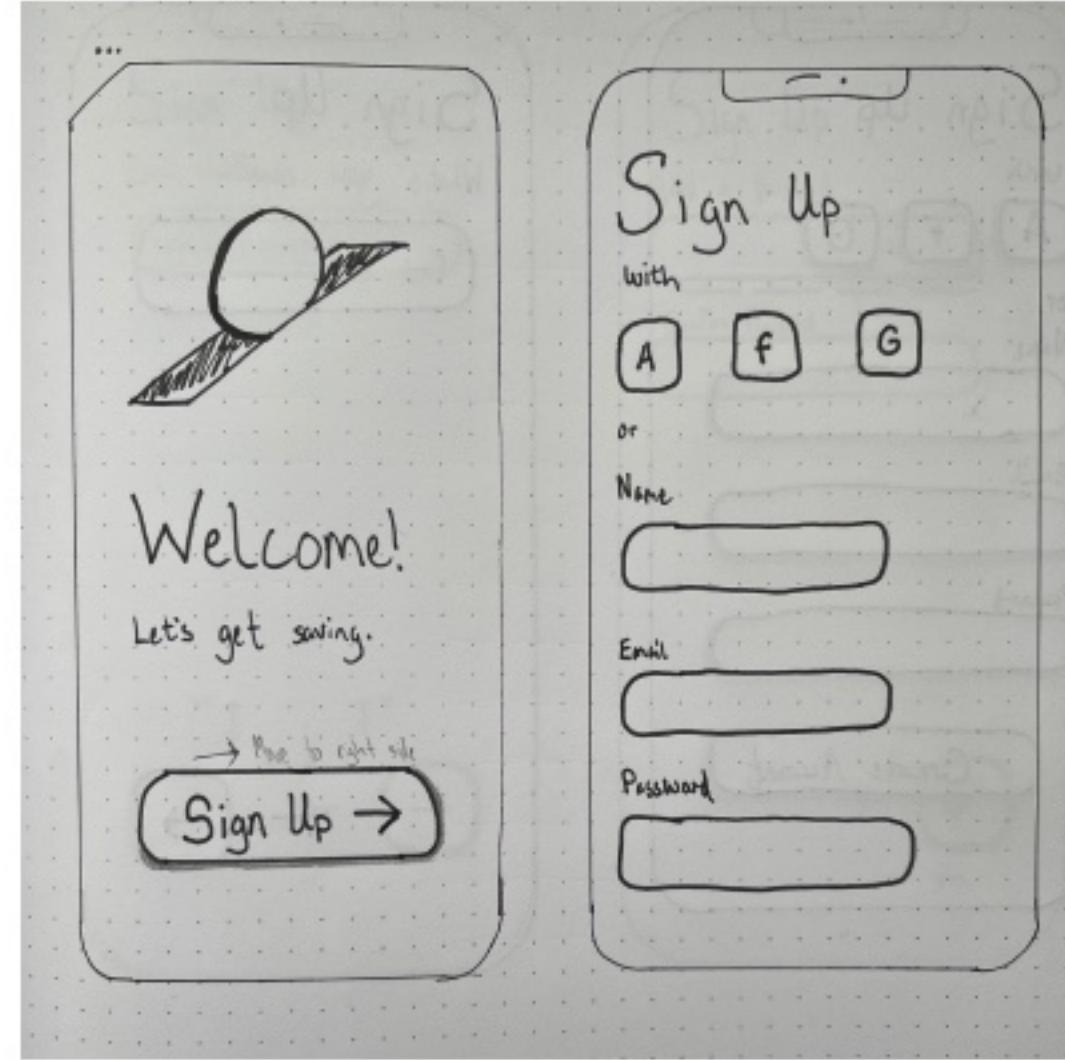
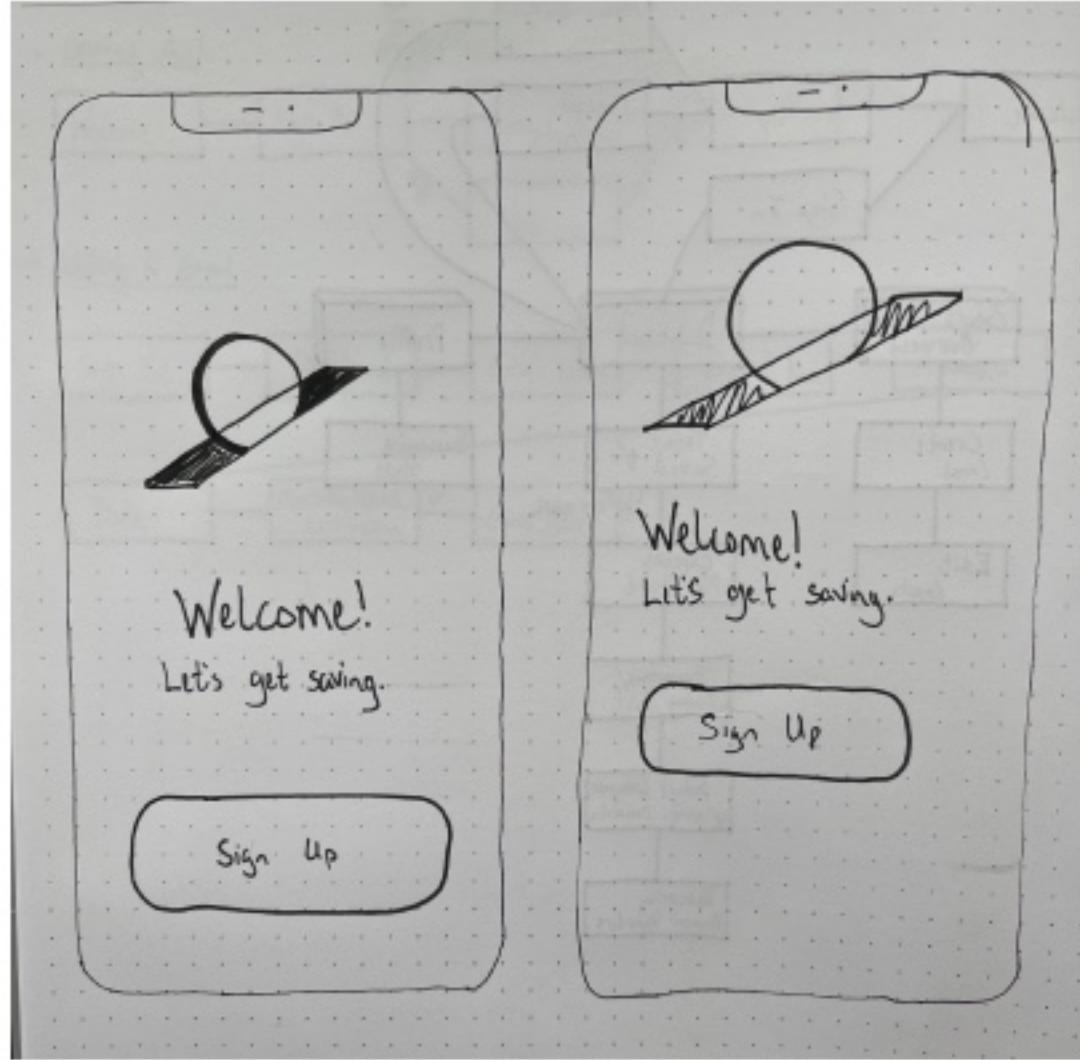
Personality



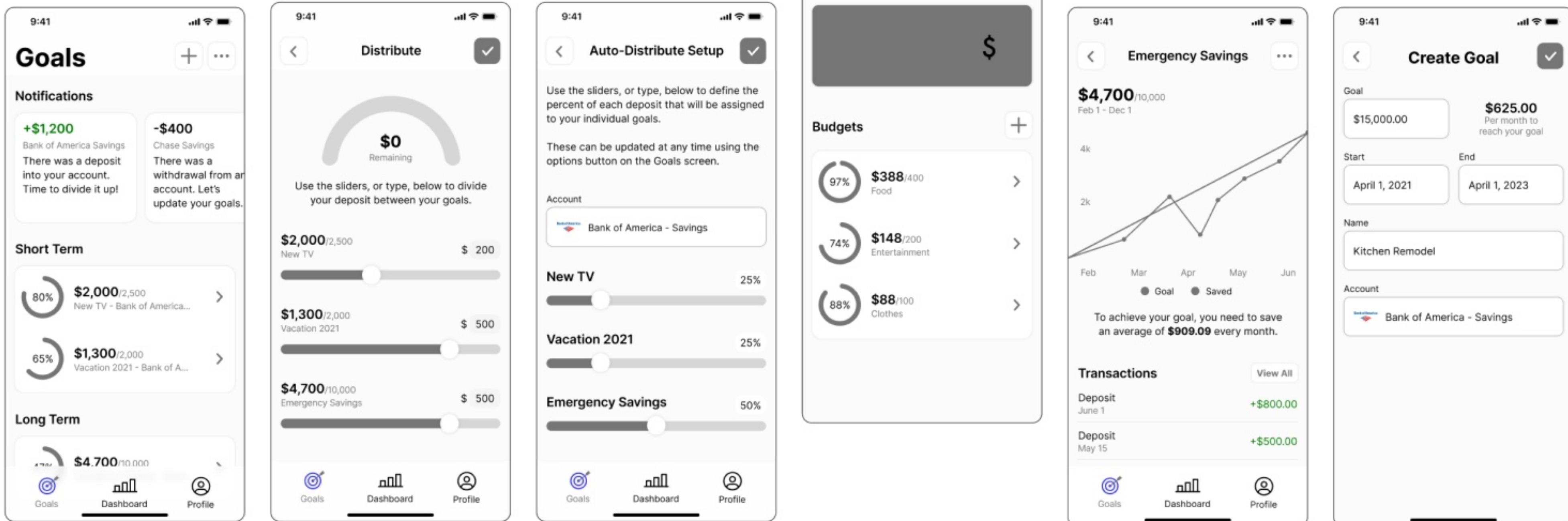
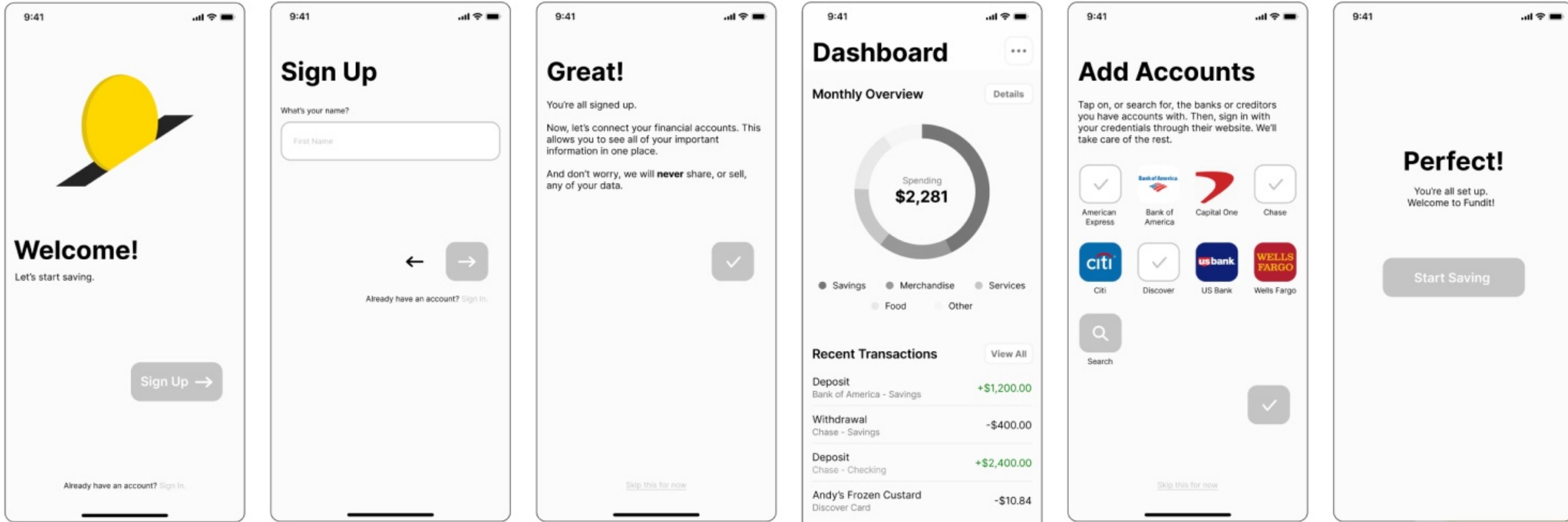
User Flow Diagram



Low-Fi Sketches



Mid-Fi Frames



User Testing

Scenario

You are a person who is reluctantly looking to start saving and paying more attention to your finances. You have just downloaded the saving and budgeting app Fundit. Please set up your account.

Users

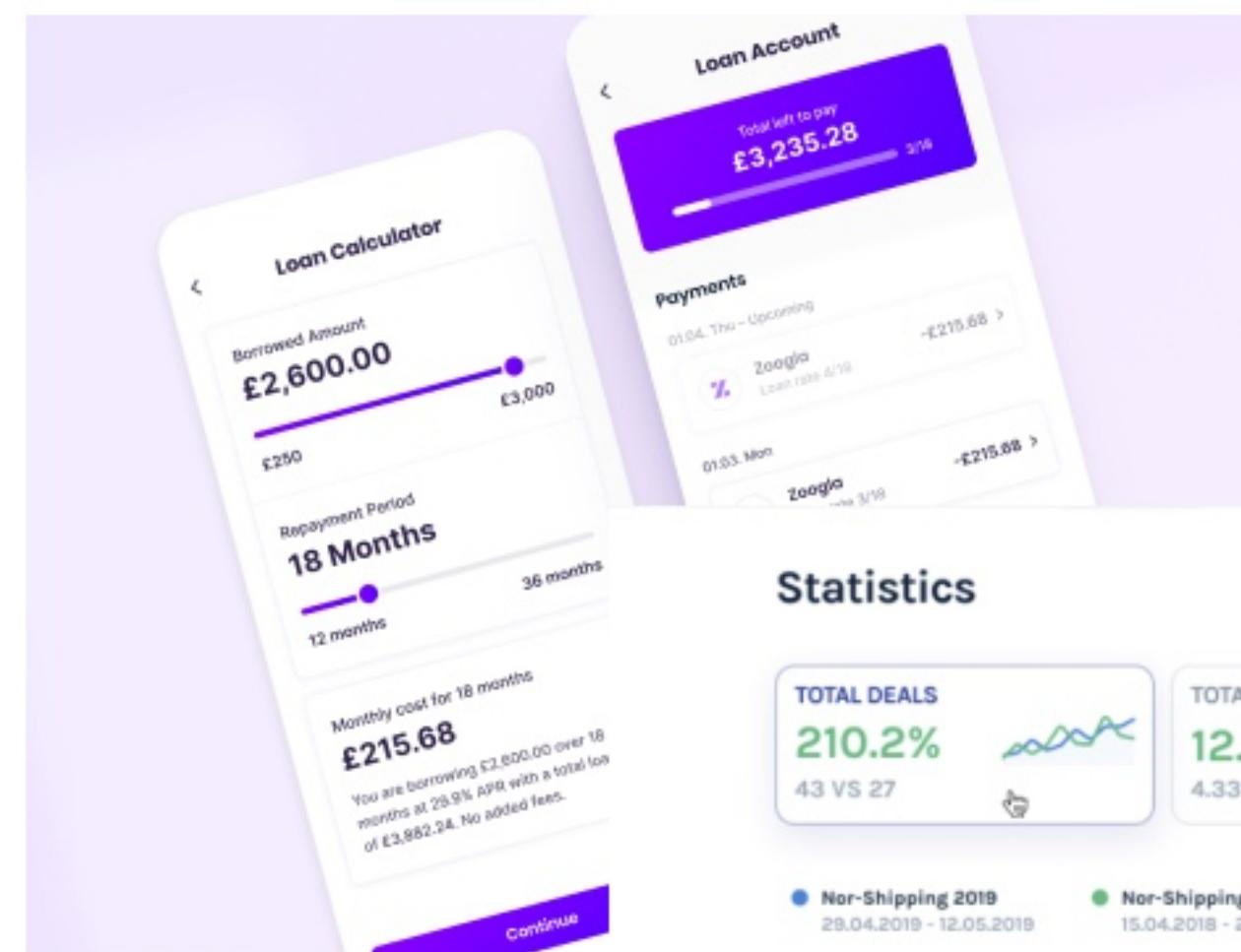
Binita - 27 - Data Analyst
Alina - 25 - Engineering Student
Namita - 24 - Paraeducator

Suggestions

- A search bar for adding accounts instead of the button.
- Condense account setup fields onto one screen.
- The “Start Saving” button might look good in green.
- Start Saving Screen feels empty.

ScENARIO	PAIN POINT	PRIORITY	SOLUTION
You are a person who is reluctantly looking to start saving and paying more attention to your finances. You have just downloaded the saving and budgeting app Fundit. Please set up your account.	Search button blends in too well on accounts screen.	Critical	Replace the search button, at the bottom, with a bar at the top.
Binita - 27 - Data Analyst Alina - 25 - Engineering Student Namita - 24 - Paraeducator	Some of the phrasing for the captions is confusing.	Critical	Reword captions on input fields to be more clear.
	“Skip this step” button on the explanation screen was unclear as to what was being skipped.	Preferential	Remove button from this screen.
	Having users enter only their first name was slightly confusing.	Preferential	Change “First Name” to “Full Name” in the name field.

Mood Board



A finance app you can trust.

Analytics Good morning, John

Save money \$2150

Income

Outlay

Increased cashback 5% Current month: \$152.18

Investments

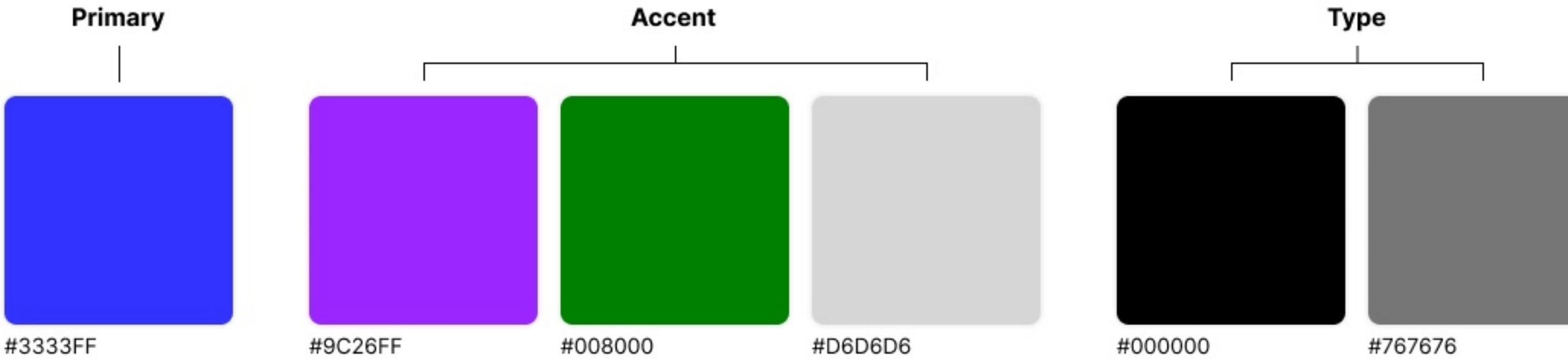
Watchlist

Top movers



Anyone can save
money.

Style Guide



Typography

Inter

Title

40px - Bold
Line Height: 48px

Header

25px - Bold
Line Height: 30px

Subheader

20px - Semi-Bold
Line Height: 24px

Body

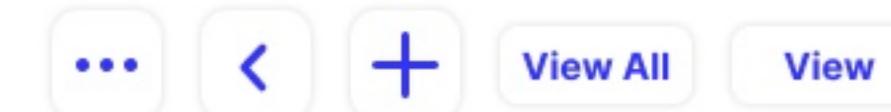
16px - Regular
Line Height: 22px

Caption

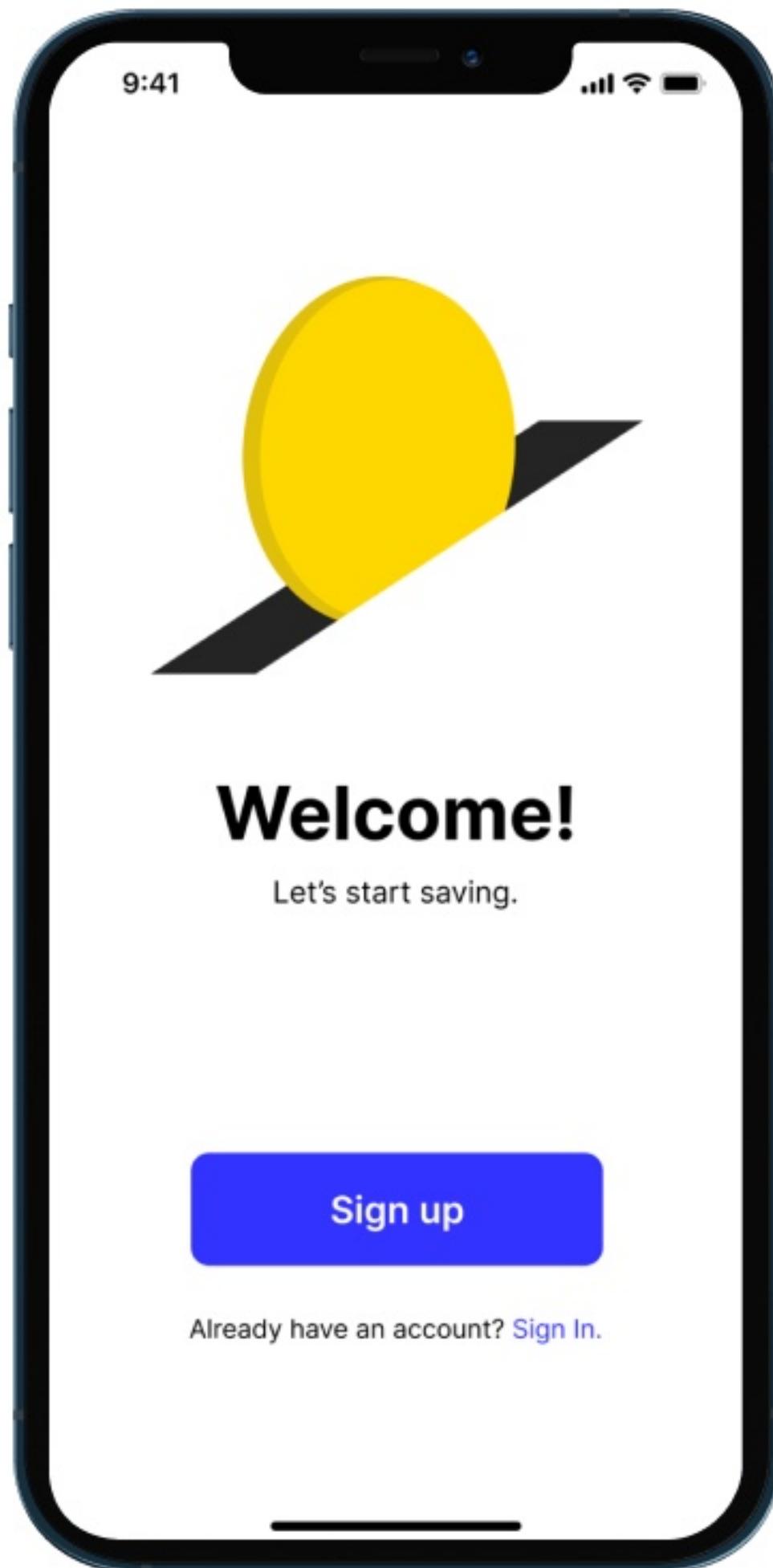
14px - Regular
Line Height: 17px

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque et purus a magna blandit ultricies. Fusce nisi sapien, pulvinar nec augue eu, posuere finibus sem.

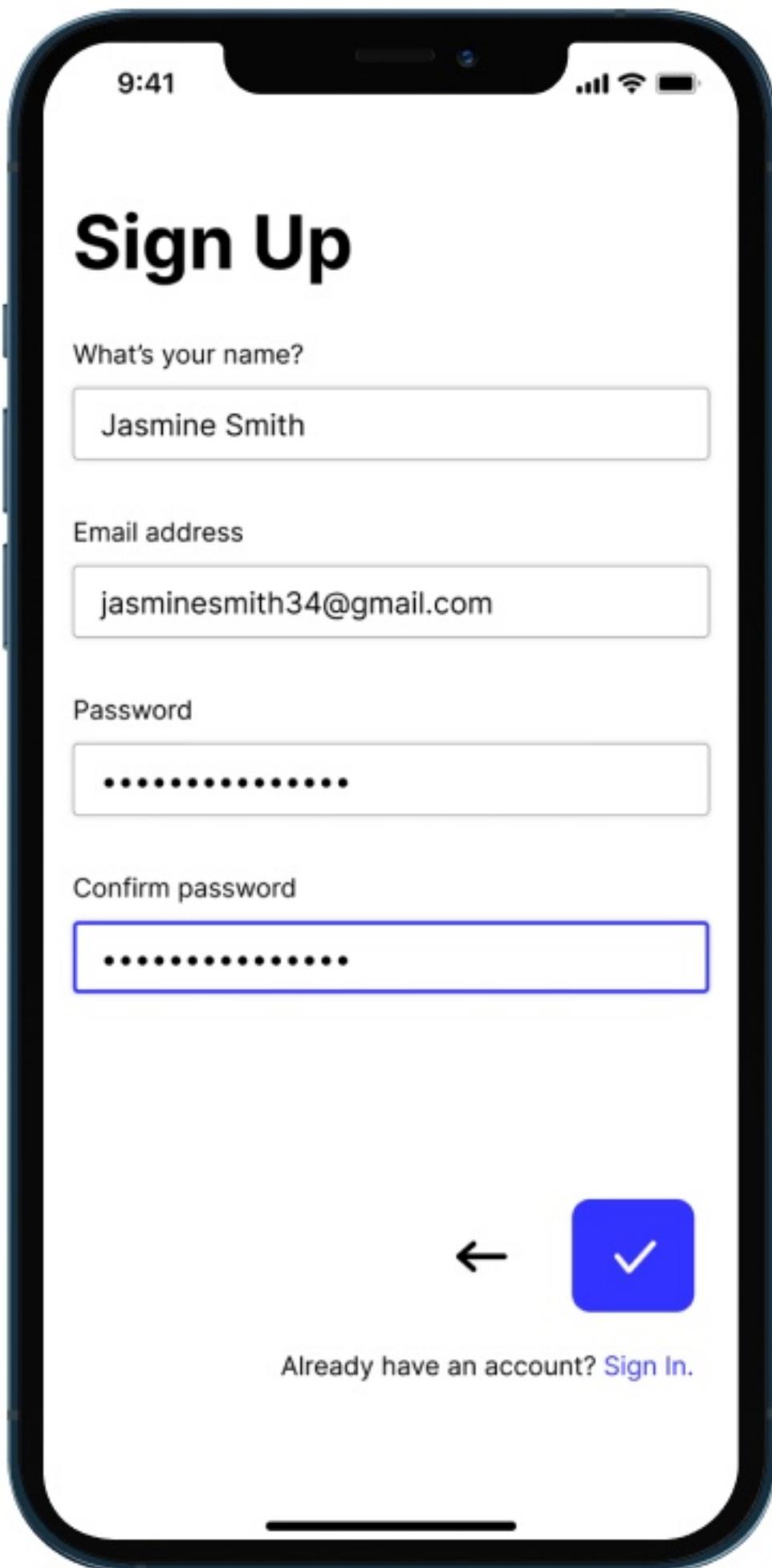
Iconography and Buttons



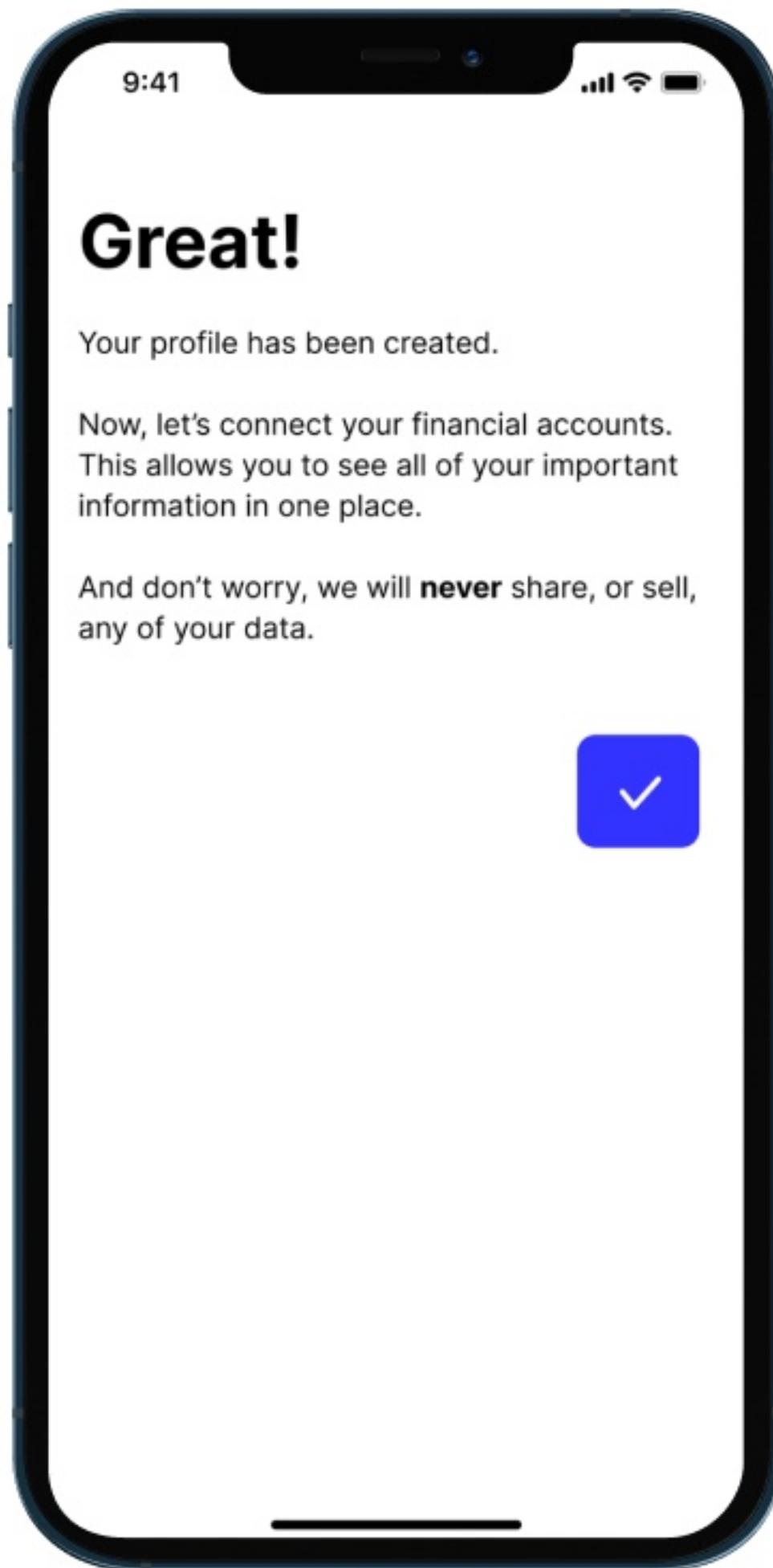
Final Screens



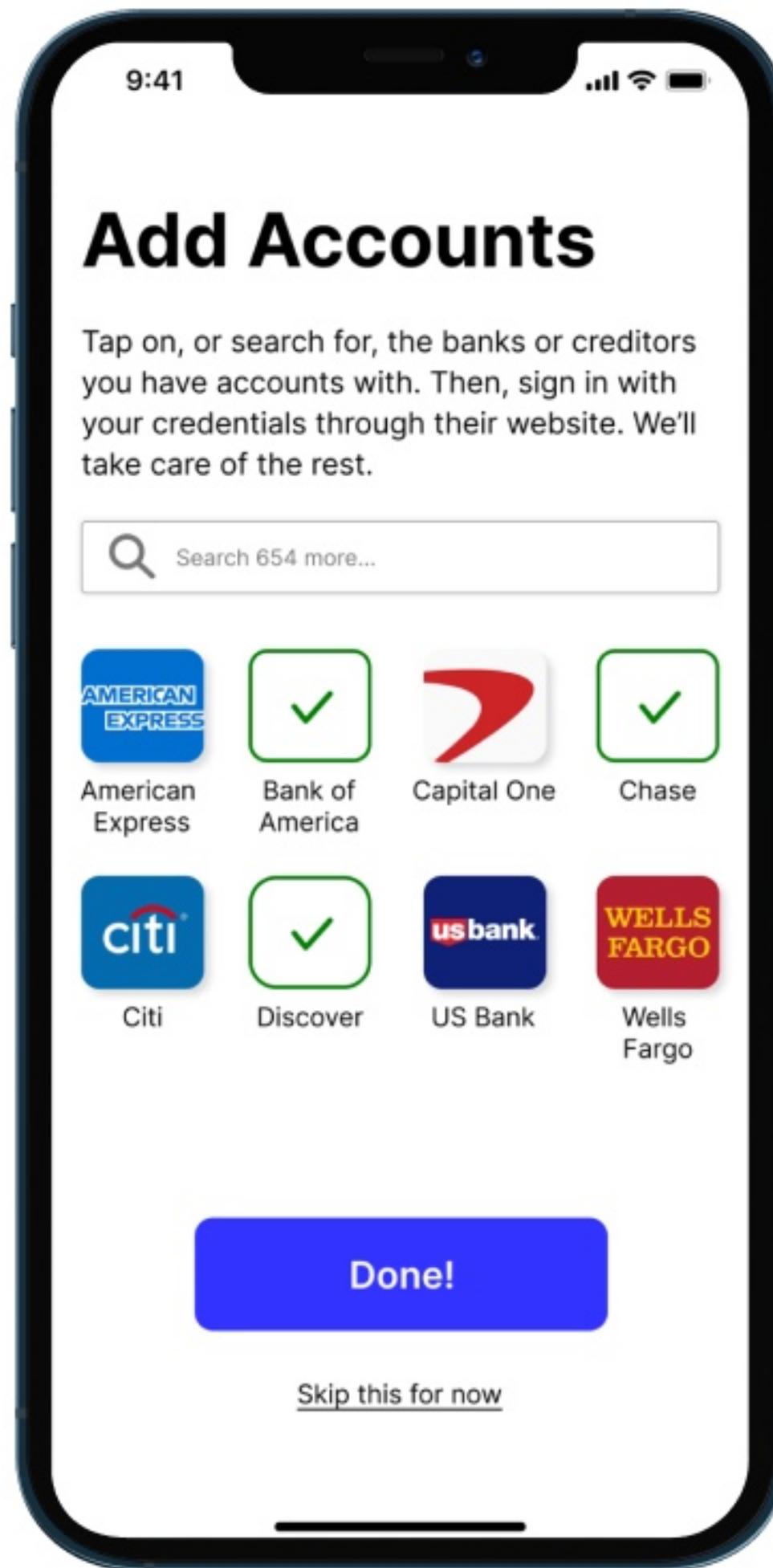
Welcome Screen



Sign Up

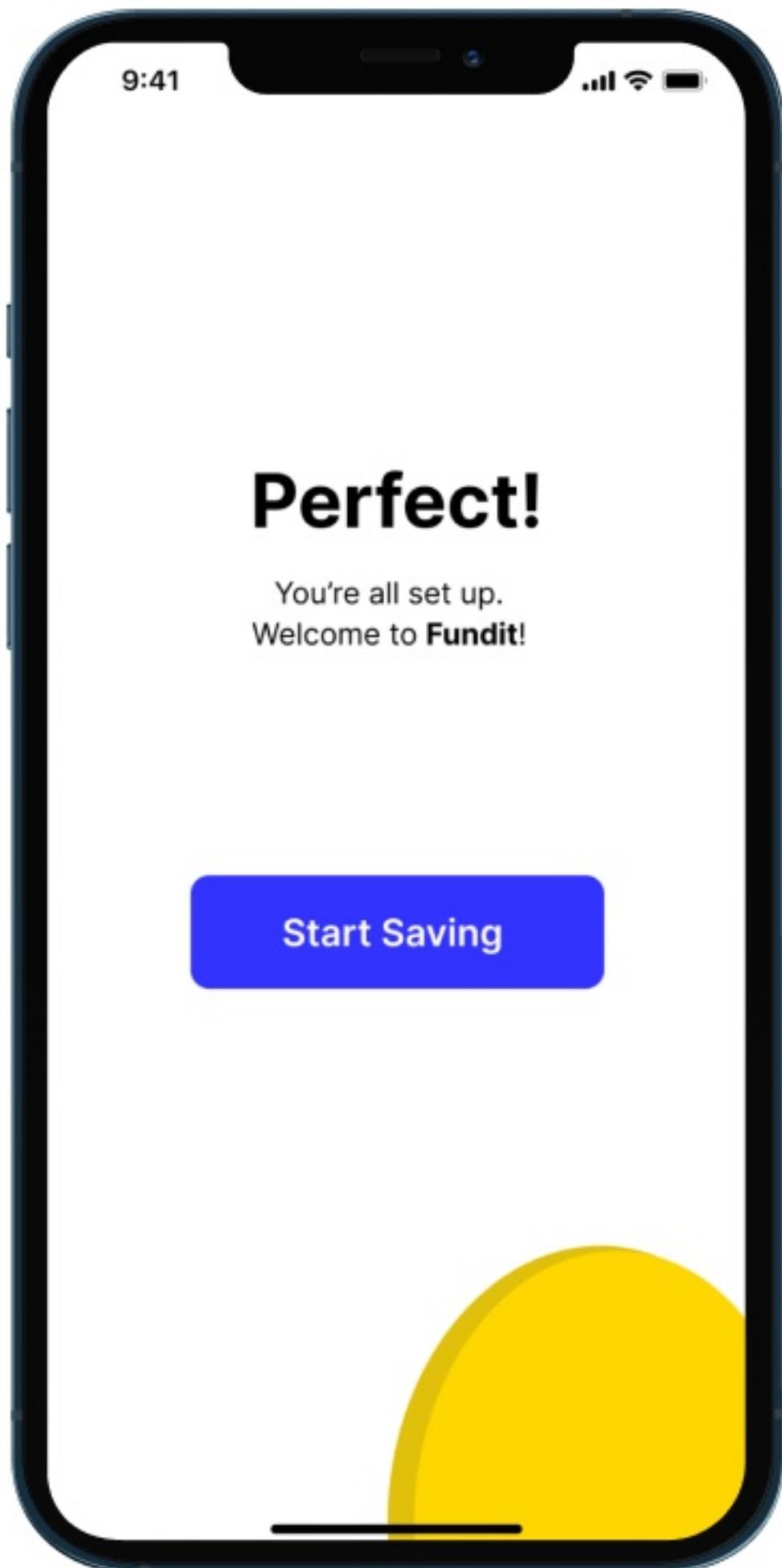


Accounts Explanation

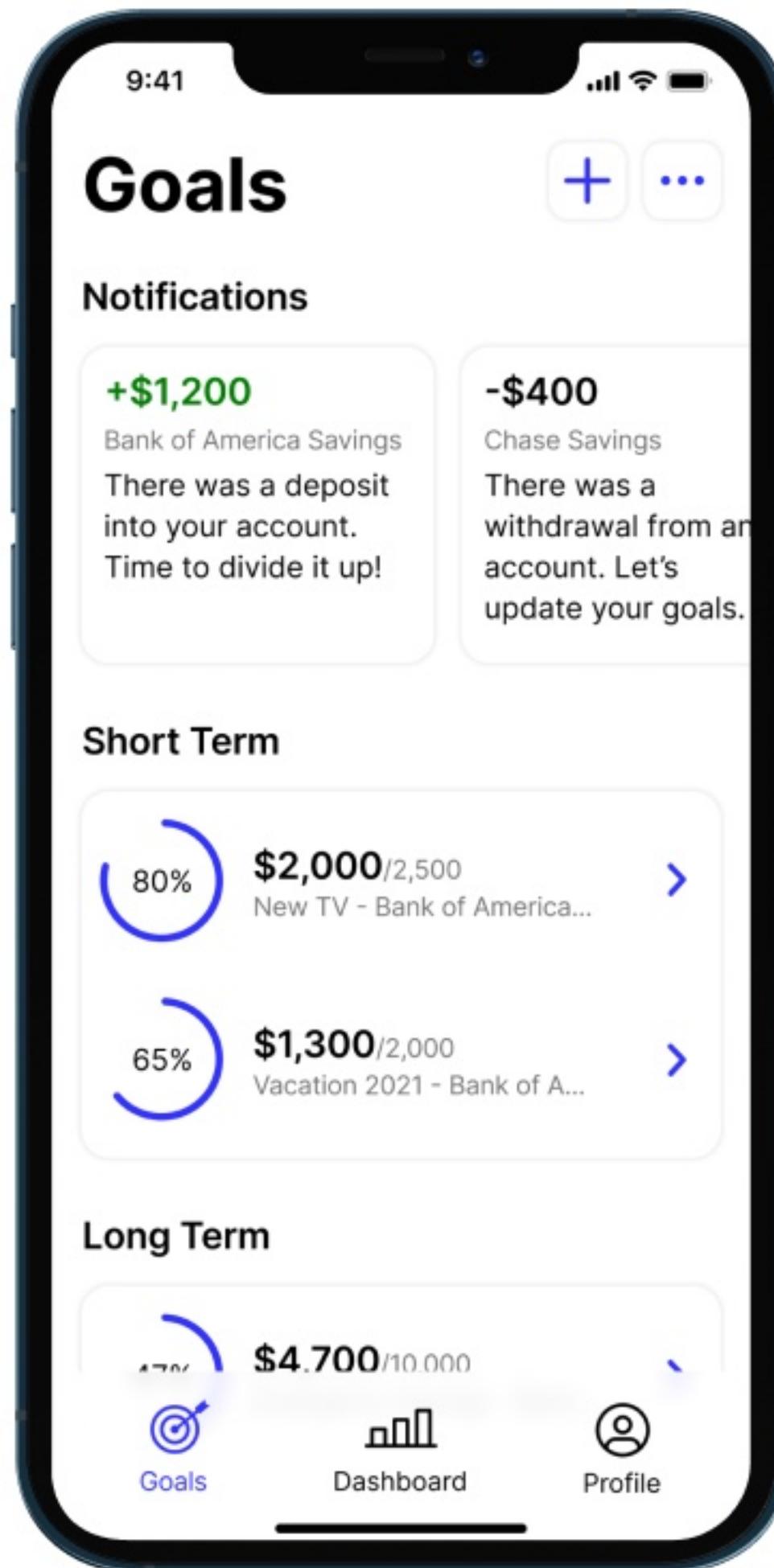


Add Accounts

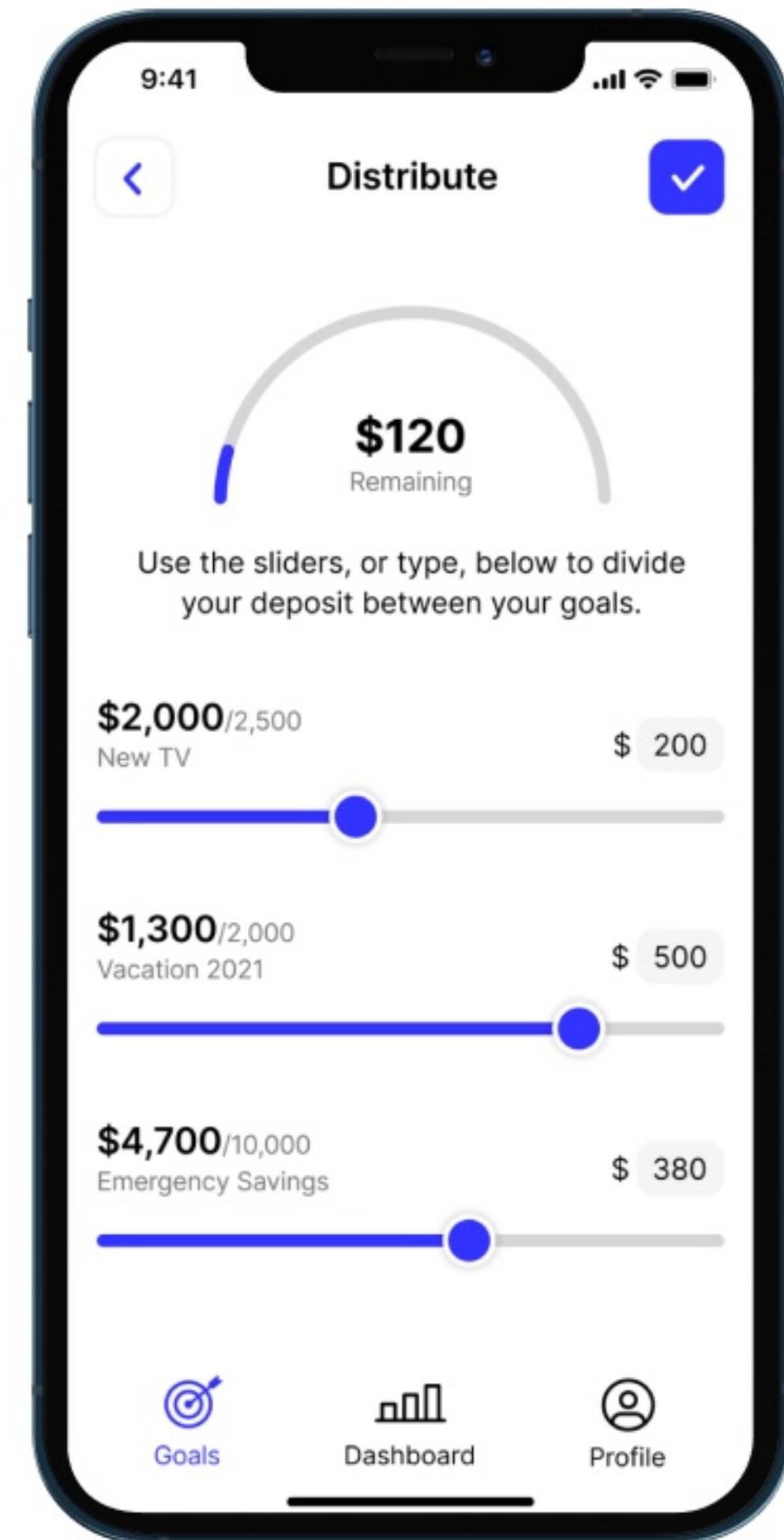
Final Screens



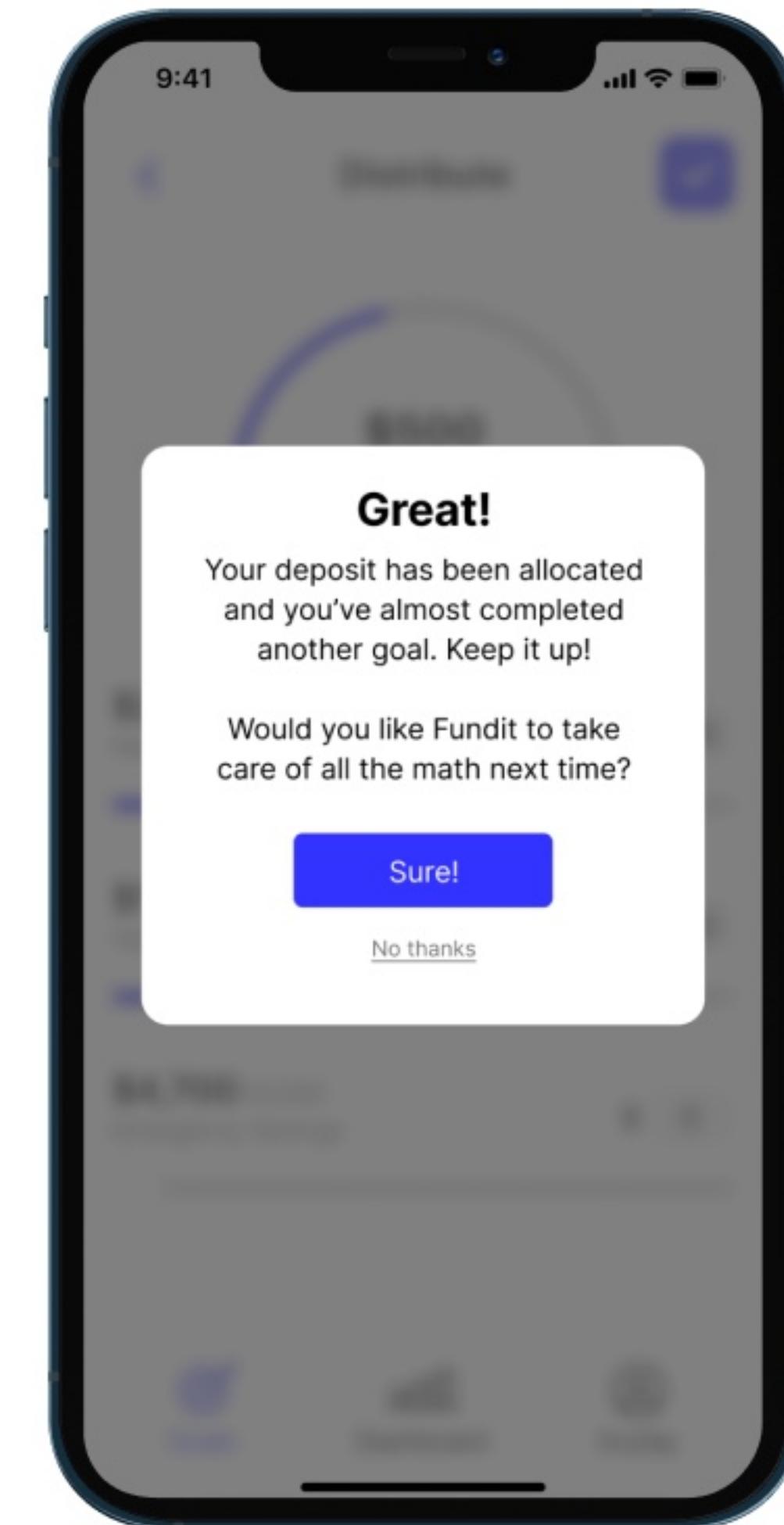
Confirmation Screen



All Goals

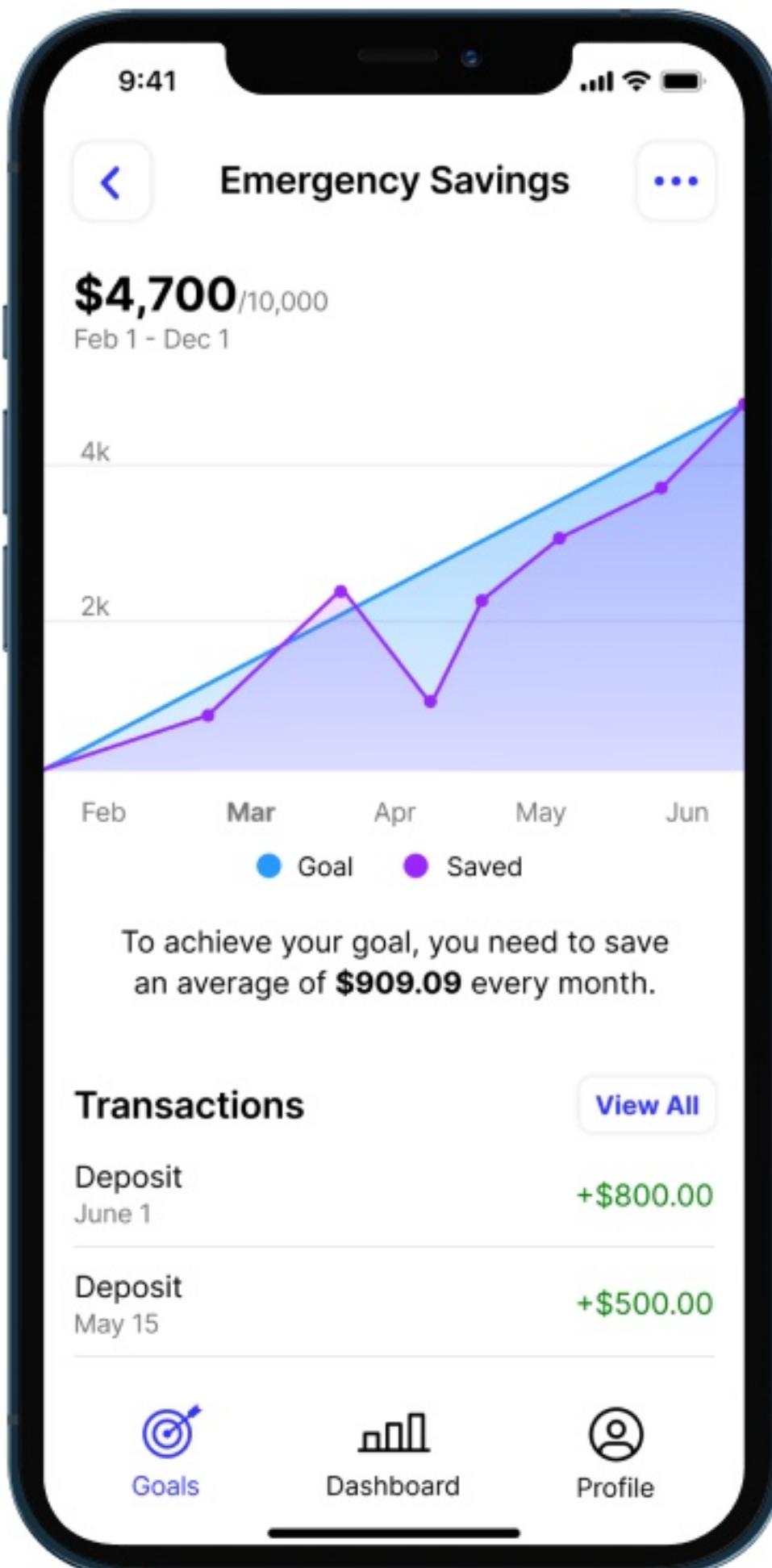
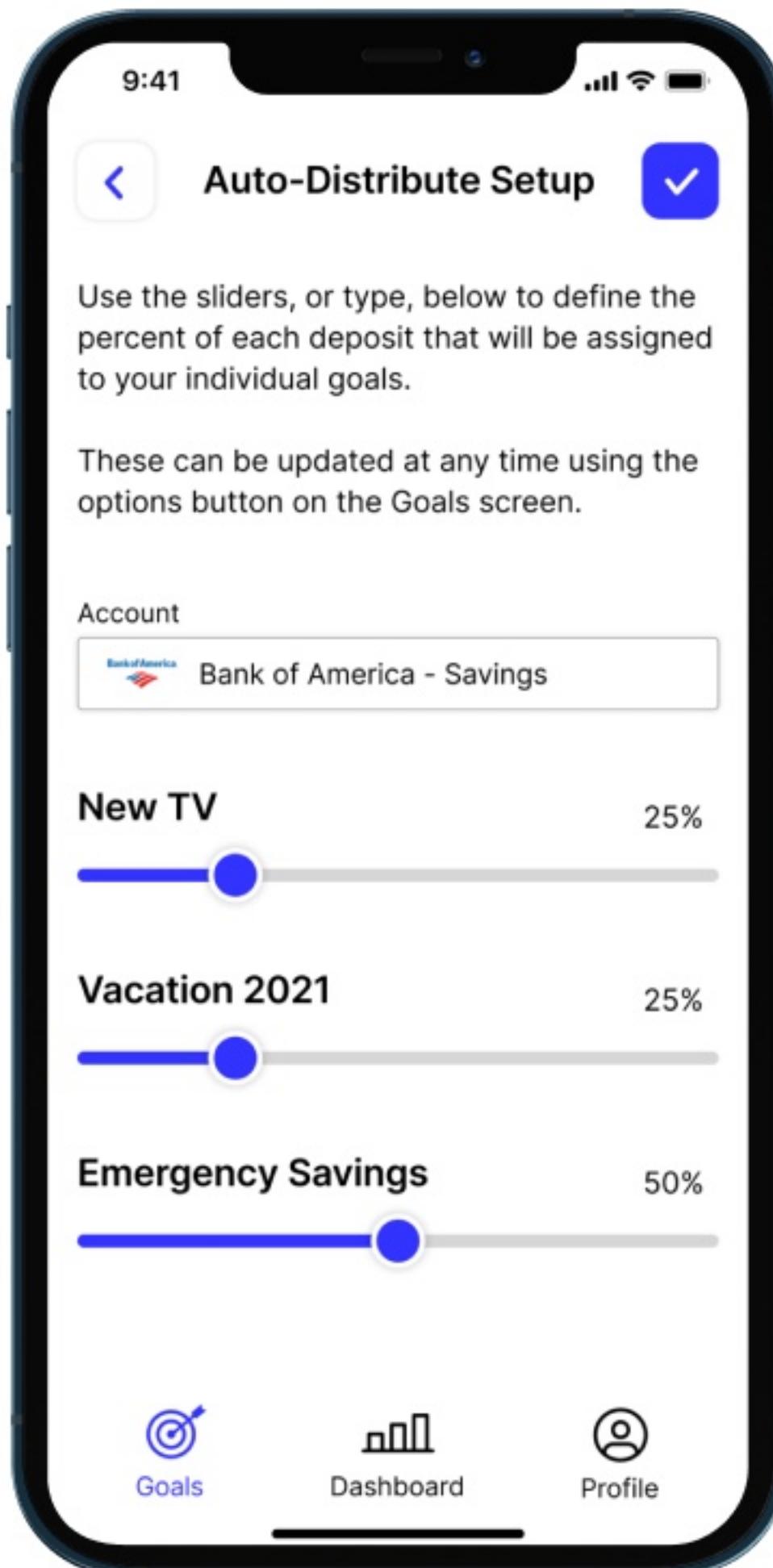


Distribute



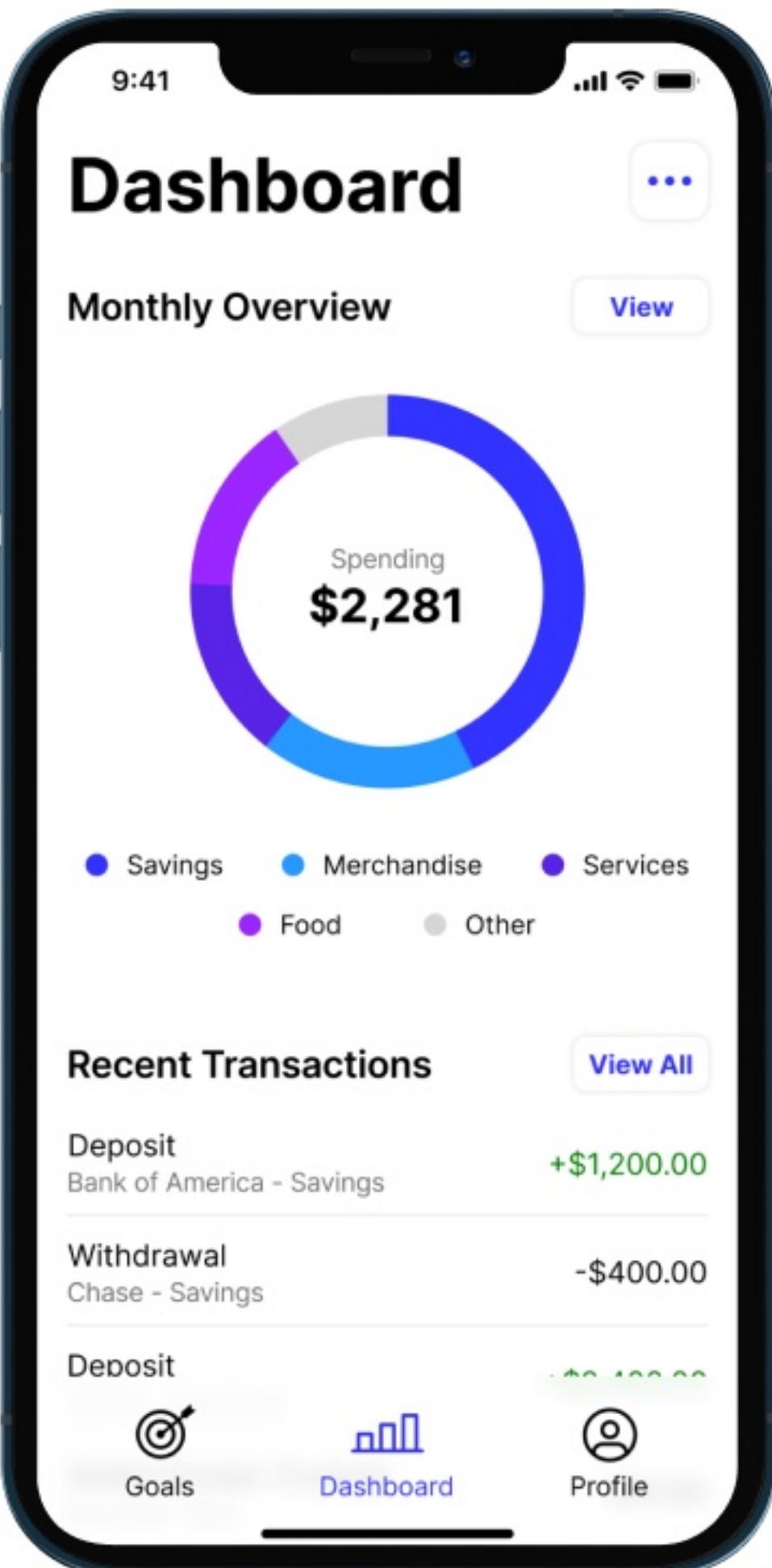
Auto-Distribute Pop-up

Final Screens



The Goal Calculator screen allows users to input a goal amount (\$15,000.00), start date (April 1, 2021), end date (April 1, 2023), and a name for the goal (Kitchen Remodel). It also specifies the account being used.

Create Goal







The Fundit website is displayed on a laptop screen. The header features the Fundit logo (a yellow lightbulb icon) and navigation links for Home, About, Contact, Resources, and Log In. Below the header, a large call-to-action button says "Anyone can save money." A subtext message reads: "The world of finance can be overwhelming. We're here to help you take charge of your money and achieve your financial goals one step at a time." A blue "Get Started" button is located at the bottom left of the main content area. A large, stylized line graph in shades of pink and blue runs diagonally across the page, starting from the bottom left and ending near the top right. Two smartphone screens are shown on the right side of the laptop, displaying the Fundit mobile application. The first phone shows a "Goals" screen with notifications for a \$1,200 deposit and two savings goals: "Short Term" (\$2,000) and "Long Term" (\$1,300). The second phone shows a "Emergency Savings" screen with a progress bar reaching \$4,700, a chart showing monthly growth, and a note about saving \$909.09 per month. Both phones have a "Transactions" section at the bottom.



Retropective

What went well

I am noticing my overall workflow and processes are improving. I am able to more quickly make design decisions and work through obstacles. Also, I'm becoming more familiar with the design tools and how to use them more effectively. While I still have a lot to learn, it's encouraging to see the progression in my abilities.

What didn't go well

Coming up with an original app name and logo within the financial category was the main pain point of this project. I wanted to challenge myself to create something original and fitting. I'm mostly happy with how both turned out and I learned a lot going through the process, but I did spend a lot of time working with them.

What can be improved

For Fundit, I would like to create more screens in the future to expand the application. A few more functions would help make it feel more complete. As for my skills, I want to keep practicing with my use of color. I'm happy with how they turned out for this project, but the process of reaching them needs improvement. However, I am making good progress with every new challenge.