

Screen 1:

You need to build a web page that looks like the figure below. You are only allowed to use HTML/CSS/JavaScript/jQuery. Please note that you can use your own text that looks similar to the content below (You don't need to copy the exact text here).

37%

Earlier you mentioned you conduct **1-4** trades per month. With this in mind, which of the following packages would best fit your needs? Please select one package, or no package at all. As a reminder, you may hover over any items in [blue](#) for more information.

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Select one

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I would not purchase any package

Continue »

- If you hover over any cell in columns 1, 2, 3, or 4 (4= “I would not purchase any package”) add gray background color to the hovered column only (See column 2):

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would not purchase any package			

- If you click on any cell in column 1, 2, or 3. Change the background color of the selected column to be while blue and set its radio button to be checked:

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would not purchase any package			

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
I would not purchase any package			

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
I would not purchase any package			

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts USD deposits directly into USD account
FX rate	1%	0.5%	0.5%
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would not purchase any package			

- When you hover over text in **BLUE**, it shows a tip with multiple paragraphs.

Select one

	Package 1	Package 2	Package 3
USD account properties	Accepts only CAD deposits (instant and regular) – conversion needed to hold USD	Accepts only deposits (instant and regular) – conversion needed to hold USD	<div>✓ Level II US and Canada (All standard trading information found in Level I data, along with additional information; includes highest/lowest bid prices, sizes of all types of trades)</div> <div>✓ Unlimited Level I streaming quotes (Feature that offers continuous real-time market quotes with basic trading information.)</div>
FX rate	1%	0.5%	<div>✓ Unlimited Level I snap quotes (Feature that allows users to view real-time market quotes containing basic trading data)</div>
Market data	Unlimited Level I snap quotes + Unlimited Level I streaming quotes	Unlimited Level I snap quotes	Level II US and Canada + Unlimited Level I streaming quotes + Unlimited Level I snap quotes
Trading platform	Mobile and web-based app	Mobile only trading app	Advanced workstation and mobile app
Research & Analytics	Morningstar/S&P research + Technical Analysis + Top-tier sell-side research	None	Morningstar/S&P research + Technical Analysis
Monthly fee	\$500 / month	\$20 / month	\$100 / month
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

I would not purchase any package

Screen 2:

You need to build a web page that looks like the figure below. You are only allowed to use HTML/CSS/JavaScript/jQuery. Please note that you can use your own text that looks similar to the content below (You don't need to copy the exact text here).

2%

Which of the following **security investment/trading** methods have you used in the last 12 months?
Select all that apply and add approximately what percentage the methods represent of your total investments.

	Used in the last 12 months	Percentage of your investments
I traded on my own using an (online) brokerage (i.e. Do-It-Yourself Investing)	<input type="checkbox"/>	<input type="text"/> %
I used an online service to automatically invest (i.e. a robo-advisor)	<input type="checkbox"/>	<input type="text"/> %
A bank, advisor or other professional managed my investments for me	<input type="checkbox"/>	<input type="text"/> %
A family member or friend manages my investments for me	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities and do not intend to trade in the next 12 months	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities but intend to trade in the next 12 months	<input type="checkbox"/>	<input type="text"/> %
I'm not sure	<input type="checkbox"/>	<input type="text"/> %
Other (please specify) <input type="text"/>	<input type="checkbox"/>	<input type="text"/> %
Number of methods selected:	<input type="text"/>	<input type="text" value="0"/> %

Continue »

- If a checkbox is selected in column 1 “Used in the last 12 months”, the input cell in column 2 “Percentage of your investments” becomes active, otherwise the input cell is non-active.
- The last cell in column 1 “Used in the last 12 months” is to count the total number of selected checkboxes dynamically.
- The last cell in column 2 “Percentage of your investments”, sums up the total of all inputs of items 1, 2, 3, 4, and 8 dynamically.

2%

Which of the following **security investment/trading** methods have you used in the last 12 months?
Select all that apply and add approximately what percentage the methods represent of your total investments.

	Used in the last 12 months	Percentage of your investments
I traded on my own using an (online) brokerage (i.e. Do-It-Yourself Investing)	<input checked="" type="checkbox"/>	10 %
I used an online service to automatically invest (i.e. a robo-advisor)	<input checked="" type="checkbox"/>	20 %
A bank, advisor or other professional managed my investments for me	<input checked="" type="checkbox"/>	30 %
A family member or friend manages my investments for me	<input checked="" type="checkbox"/>	20 %
I did not trade securities and do not intend to trade in the next 12 months	<input type="checkbox"/>	%
I did not trade securities but intend to trade in the next 12 months	<input type="checkbox"/>	%
I'm not sure	<input type="checkbox"/>	%
Other (please specify) <input type="text" value="other text"/>	<input checked="" type="checkbox"/>	20 %
Number of methods selected:	5	100 %

Continue »

- If the total percentage is not equal 100, the font color is changed to be red.

2%

Which of the following **security investment/trading** methods have you used in the last 12 months?
Select all that apply and add approximately what percentage the methods represent of your total investments.

	Used in the last 12 months	Percentage of your investments
I traded on my own using an (online) brokerage (i.e. Do-It-Yourself Investing)	<input checked="" type="checkbox"/>	10 %
I used an online service to automatically invest (i.e. a robo-advisor)	<input checked="" type="checkbox"/>	20 %
A bank, advisor or other professional managed my investments for me	<input type="checkbox"/>	%
A family member or friend manages my investments for me	<input checked="" type="checkbox"/>	30 %
I did not trade securities and do not intend to trade in the next 12 months	<input type="checkbox"/>	%
I did not trade securities but intend to trade in the next 12 months	<input type="checkbox"/>	%
I'm not sure	<input type="checkbox"/>	%
Other (please specify) <input type="text"/>	<input type="checkbox"/>	%
Number of methods selected:	3	60 %

Continue »

- Items 5, 6, and 7 are **exclusive**, if any checkbox in 5, 6, or 7 is selected, it deselects all other checkboxes, clears all values in column 2 and “Other specify”, and sets the total percentage to 0.

2%

Which of the following **security investment/trading** methods have you used in the last 12 months?
Select all that apply and add approximately what percentage the methods represent of your total investments.

	Used in the last 12 months	Percentage of your investments
I traded on my own using an (online) brokerage (i.e. Do-It-Yourself Investing)	<input type="checkbox"/>	<input type="text"/> %
I used an online service to automatically invest (i.e. a robo-advisor)	<input type="checkbox"/>	<input type="text"/> %
A bank, advisor or other professional managed my investments for me	<input type="checkbox"/>	<input type="text"/> %
A family member or friend manages my investments for me	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities and do not intend to trade in the next 12 months	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities but intend to trade in the next 12 months	<input checked="" type="checkbox"/>	<input type="text"/> %
I'm not sure	<input type="checkbox"/>	<input type="text"/> %
Other (please specify) <input type="text"/>	<input type="checkbox"/>	<input type="text"/> %
Number of methods selected:	1	0 %

Continue »

- When you hover over text in **BLUE**, it shows a tip text in **one** paragraph:

2%

Which of the following **security investment/trading** methods have you used in the last 12 months?
Select all that apply and add approximately what percentage the methods represent of your total investments.

DIY trading refers to any trading/investing accounts that you personally manage, not anything that is managed for you (e.g. robo-advisor, financial advisor at a bank)

	Used in the last 12 months	Percentage of your investments
I traded on my own using an (online) brokerage (i.e. Do-It-Yourself Investing)	<input type="checkbox"/>	<input type="text"/> %
I used an online service to automatically invest (i.e. a robo-advisor)	<input type="checkbox"/>	<input type="text"/> %
A bank, advisor or other professional managed my investments for me	<input type="checkbox"/>	<input type="text"/> %
A family member or friend manages my investments for me	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities and do not intend to trade in the next 12 months	<input type="checkbox"/>	<input type="text"/> %
I did not trade securities but intend to trade in the next 12 months	<input type="checkbox"/>	<input type="text"/> %
I'm not sure	<input type="checkbox"/>	<input type="text"/> %
Other (please specify) <input type="text"/>	<input type="checkbox"/>	<input type="text"/> %
Number of methods selected:	<input type="text"/>	0 %

Continue »

Screen 3:

You need to build a web page that looks like the figure below. You are only allowed to use HTML/CSS/JavaScript/jQuery. Please note that you can use your own text that looks similar to the content below (You don't need to copy the exact text here).

	Preference		
	Must Have	Like	Do not need
Biometrics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ID card reader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contactless badge reader	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Camera	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offline usability of time clock	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backup battery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programmable commands for electronic devices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Express Hardware Replacement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware Maintenance Repair	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Select section to jump to ▼

- After you select one radio button for each item under group 1 “**Preference**”, group 2 “**Willingness to Pay**” appears:

	Preference			Willingness to Pay		
	Must Have	Like	Do not need	Would pay for	Might pay for	Expect for free
Biometrics	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ID card reader	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contactless badge reader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
Camera	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offline usability of time clock	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backup battery	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programmable commands for electronic devices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
Express Hardware Replacement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hardware Maintenance Repair	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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- If at least one radio button in group 1 “**Preference**” is unchecked, group 2 “**Willingness to Pay**” should disappear. This should be dynamic.
- Under group 1 “**Preference**”, if the “**Do not need**” is selected to any item, all radio buttons of this item under group 2 “**Willingness to Pay**” should be disabled (See above items 3 and 7). This should be dynamic.