

DESIGN

PORTFOLIO

Tiffany Yang



ABOUT ME

Hello, I'm Tiffany! A budding UI/UX designer and lifelong learner fascinated by **social change**. With a love for new experiences and broad range of interests from **mental health** to **wealth management**, I am always up to take on new exciting projects!

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CASE STUDY

A wealth management app
for self-directed investing

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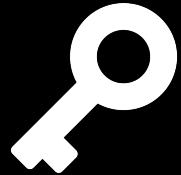
OTHER WORKS

Other UI/UX design and
creative work I've done!

01 J.P. INVEST!

A wealth management app that optimizes user experience for **self-directed investing**

PART 1. UNDERSTAND



KEY PROMPT

PART 1.

Reimagine the user experience focusing on features within mobile apps in the wealth management ecosystem

What do wealth management clients want to see when **engaging with data?**

Based on a global online poll of **877** investors by FactSet:

- **Asian investors want more customization and real-time updates**
 - Negative view of online interactions with their primary wealth managers
 - $\frac{1}{3}$ of respondents feel that information is **not customizable** to their interests and goals
- **Visualization is KEY**
 - Clearer **synopsis** and **interactive tools** are the most desirable improvements
 - Preference for **more signposting** to illustrate portfolio performance

A LOOK INTO: WEALTH MANAGEMENT IN ASIA

A black and white photograph of a young man named Chapman. He is wearing dark-rimmed glasses, has dark hair, and is dressed in a dark suit jacket over a light-colored t-shirt. He is looking slightly to his left with a neutral expression.

Risk Appetite



High

USER PERSONA #1

BIOGRAPHY

Chapman is a **technology startup CEO** who always has a “**can do**” attitude and possesses a very strong focus on getting things done. He is always **on-the-go** and likes to **plan everything ahead of time**. While very charismatic and stimulating to be around, he absolutely hates to lose and becomes a very argumentative person when he is not winning.

MOTIVATION

He wants to grow his money to reinvest into his startup; Interested in more short-term returns

GOAL

Results-Oriented: Wants to get as much return on his investment as fast as possible

NEEDS

- So caught up in running his business, he **needs help planning ahead** with his financial investments
- He has **some general knowledge** on fund investments but is not sure which funds suit his risk appetite the best

FRUSTATIONS

- **Busy** business owner with little freedom to think beyond his employees’ next paychecks or the next big sales push
- He likes to buy funds but tends to **forget about checking up on them**, especially when he gets busy with his business

NAME: YUNG CHAPMAN
GENDER: MALE
AGE: 32



Risk Appetite



Med

USER PERSONA #2

BIOGRAPHY

Brown is the head sales manager of a **social impact driver business** in its 10th year of running. She is an **avid volunteer** in a local animal shelter and works to give back to the community. Under normal, everyday circumstances, she likes to talk expansively about how she wants to use her **wealth to benefit others**.

MOTIVATION

- She wants to invest into ESG funds, believing that her money will support companies that will benefit the community

GOAL

- Generate enough small gains in the short term to **give back** but also would like to invest in long term funds for **stability**
- Wants to learn how to create a **diverse fund portfolio**

NEEDS

- Would like to know which funds to invest to and which ones are centered around ESG

FRUSTATIONS

- Tends to forget about the funds that she has invested into
- **Gives up easily** in buying, selling and switching funds if the process is not easy to complete

NAME: ALI BROWN
GENDER: FEMALE
AGE: 41



Risk Appetite



Low

USER PERSONA #3

BIOGRAPHY

Kim Dré is a 52-year-old **economics professor** who reads stock prospectuses for fun and has a poster of Warren Buffet on his garage wall. He works **full time** and makes a **5 figure income** along with his wife. However, he is someone who has worked long hours to get to where he is now. As a result, he is very **sensitive and wary of how he spends his money**.

MOTIVATION

- He is planning to **retire in 8 years time** and would like to invest some of his money to make sure he has **enough money to live a comfortable life** with his spouse

GOAL

- Invest into **long term funds** that has low risk and stable gains

NEEDS

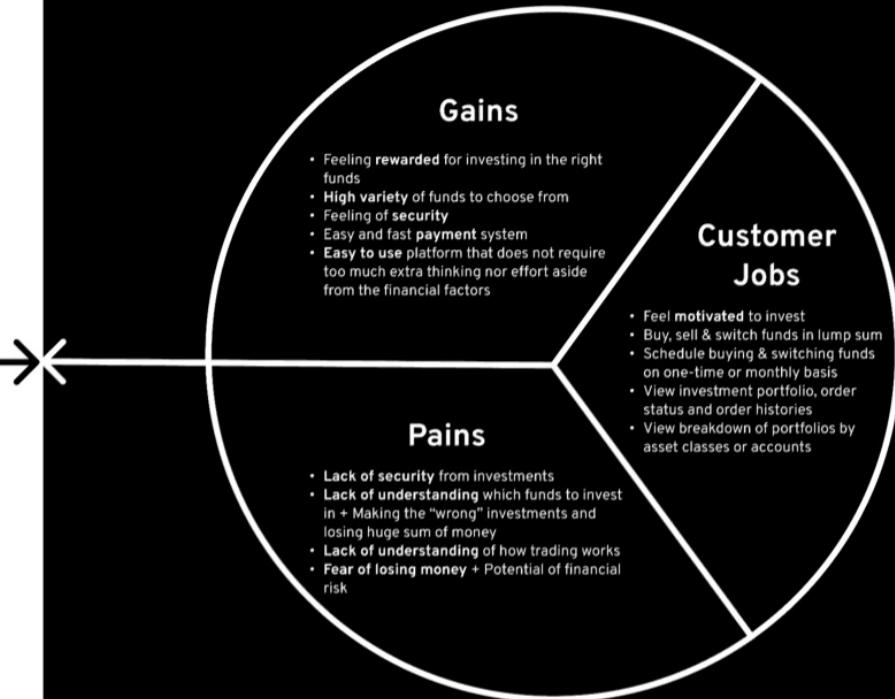
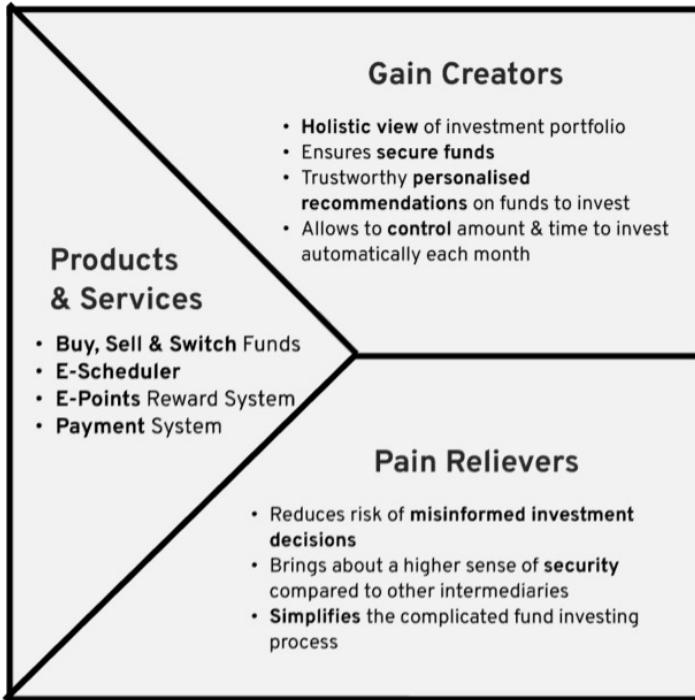
- He wants a **secure platform** where he is sure that his invested money is in safe hands
- He is very particular about where his money goes and wants to **track his gains and losses** everyday

FRUSTATIONS

- For most platforms he has tried out, he is not sure whether he can **trust** them because he does not know who manages them

NAME: KIM DRÉ
GENDER: MALE
AGE: 52

PART 2. DESIGN



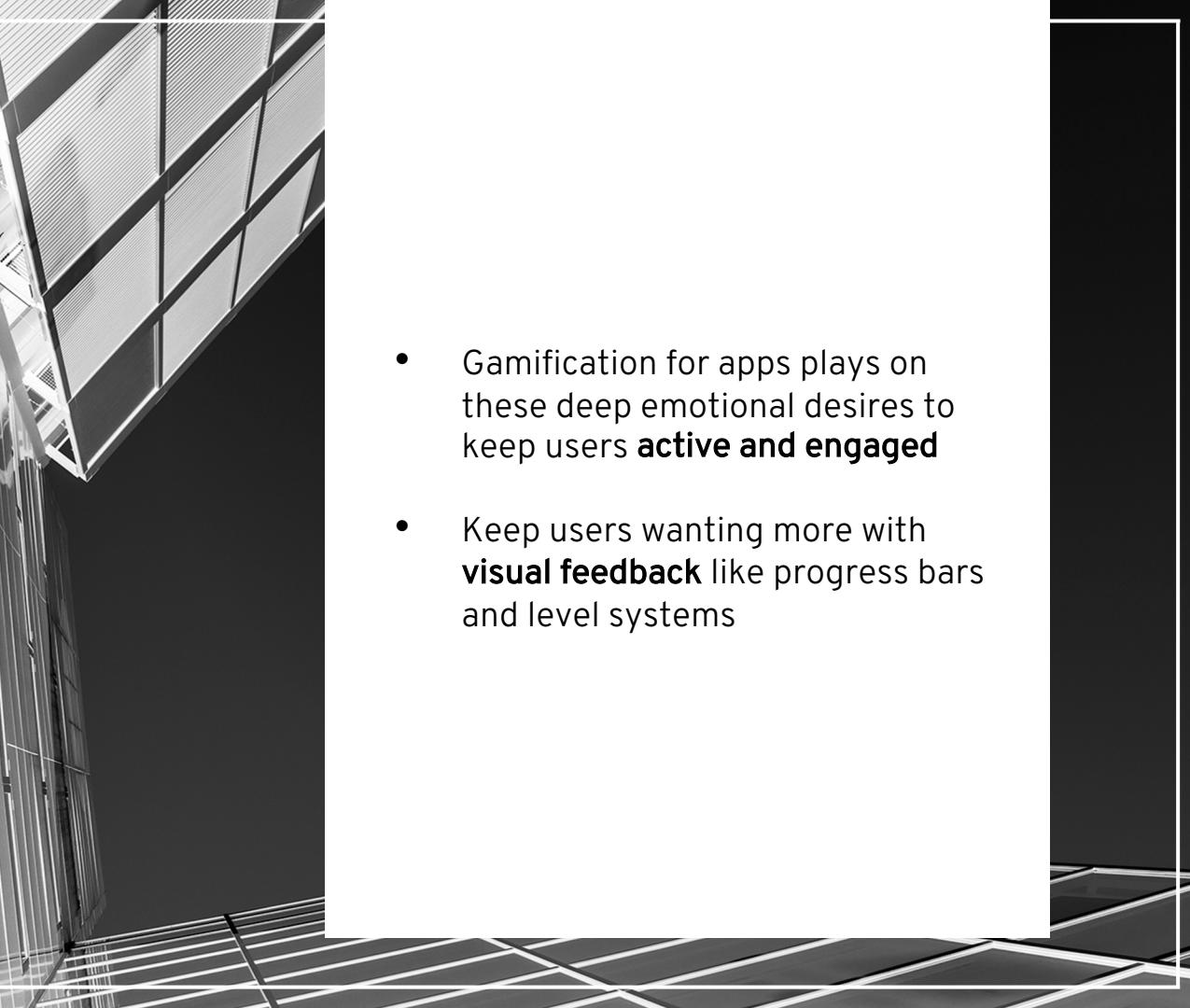
EXPERIENCES ARE THE NEW SOCIAL CURRENCY

- Holistic view of investment portfolio
 - Ensures secure funds
 - Trustworthy personalised recommendations
 - Allows to connect automatically to financial institutions

- # RETHE

TWEAK TO EACH USER

GAMIFICATION AS A SOLUTION



- Gamification for apps plays on these deep emotional desires to keep users **active and engaged**
- Keep users wanting more with **visual feedback** like progress bars and level systems



BUT KEEPING RISK IN MIND!

People may feel **cautious** about games provided by banks as they don't want someone to play games with their savings.

So one must carefully **decide which elements** of the user experience will be gamified and keep **data security** and **account privacy** in mind.

KEY ELEMENTS



PERSONALIZATION

Customize app experience to each and every user

EDUCATION

Help users grow and learn through the app

MINOR GAMIFICATION

Tweak details to keep app engaging for users

DESIGN CHOICES

Open Sans Light
Open Sans Light Italic
Open Sans Regular
Open Sans Regular Italic
Open Sans Semibold
Open Sans Semibold Italic
Open Sans Bold

TYPOGRAPHY

Open Sans as main font
Designed for legibility
Optimized for mobile interfaces
Neutral yet friendly appearance



COLOR SCHEME



Purple as primary colour

- More suitable for purposes of
- mobile app
- Looks clean and clear, making it appealing and comfortable to users
- Draws attention



NEW FEATURES



TUTORIAL

Help users know the benefits awaiting them



VERIFICATION

Prevent users dropping out amidst sign up process



BACKGROUND QUIZ

Allows the app to become more personalized for each user



MARKET INSIGHTS

Offer the right "tools" for users to make better decisions



E-SCHEDULER

With recommended funds to ease the investment process



PORTFOLIO BUILDER

Lets users analyse their investments and improve them

WHAT IS IT?

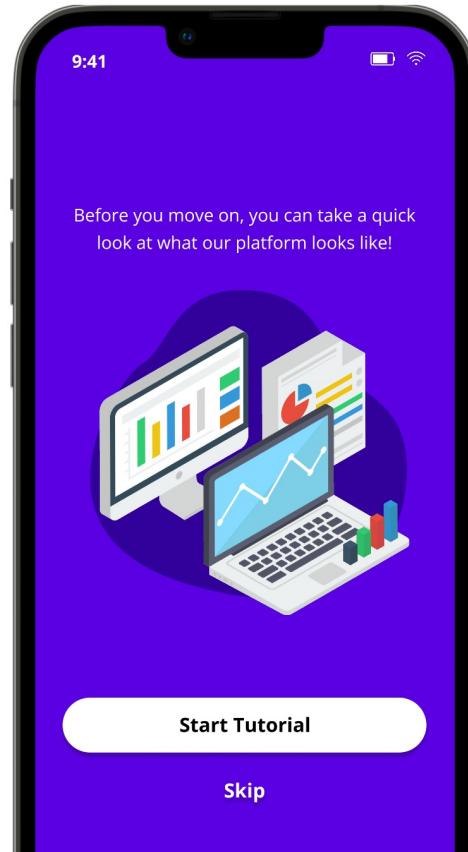
Users can demo the app features before going through the sign-up process

WHY?

Users tend to **drop out** in the middle of signing-up process

→ Have users interact with features to let them **experience first-hand** the app **benefits** & **entice** them to stick with sign-up process

TUTORIAL



TUTORIAL

WHAT IS IT?

Users can demo the app features before going through the sign-up process

Giving away personal information for formal account registration is **BIG** step for users

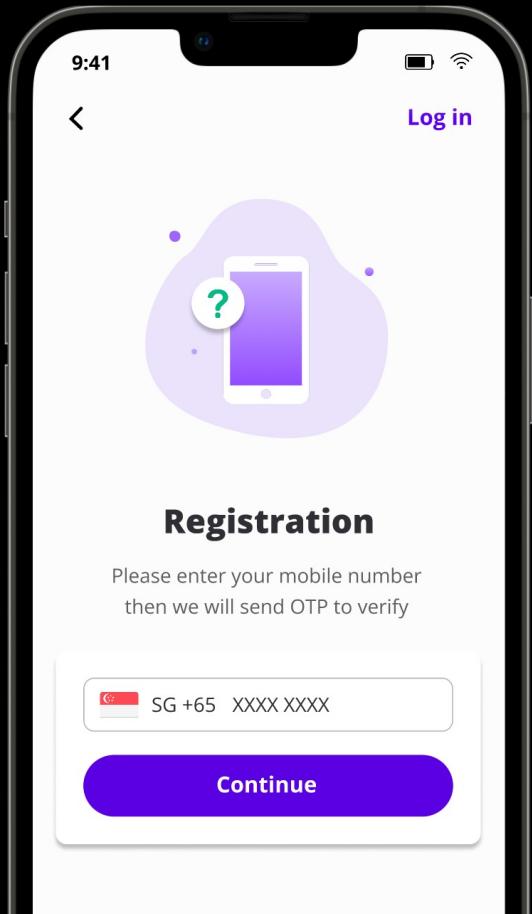
WHY?

Users tend to ~~drop out in the middle of signing-up~~ process

"Tutorial" will help them get a taste of the benefits and **feel the need** to register

→ Have users interact with features to let them **experience first-hand** the app **benefits** & **entice** them to stick with sign-up process





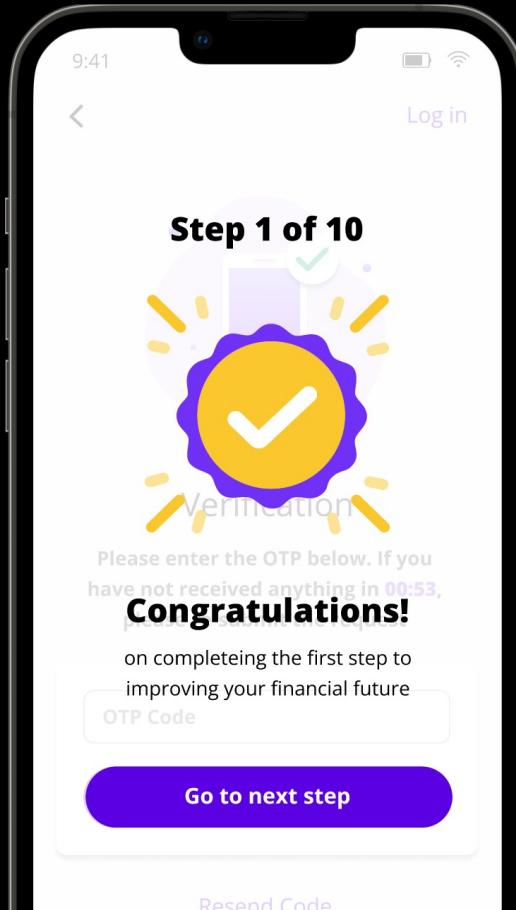
VERIFICATION

WHAT IS IT?

Make small “**successes**” throughout & showcase the **# of steps** users have left + **Minor animation** to keep users engaged

WHY?

Users are informed which part of the process they are in & **feel rewarded** for completing each part



VERIFICATION

WHAT IS IT?

Make small “**successes**” throughout & showcase the **# of steps** users have left + **Minor animation** to keep users engaged

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WHAT IS IT?

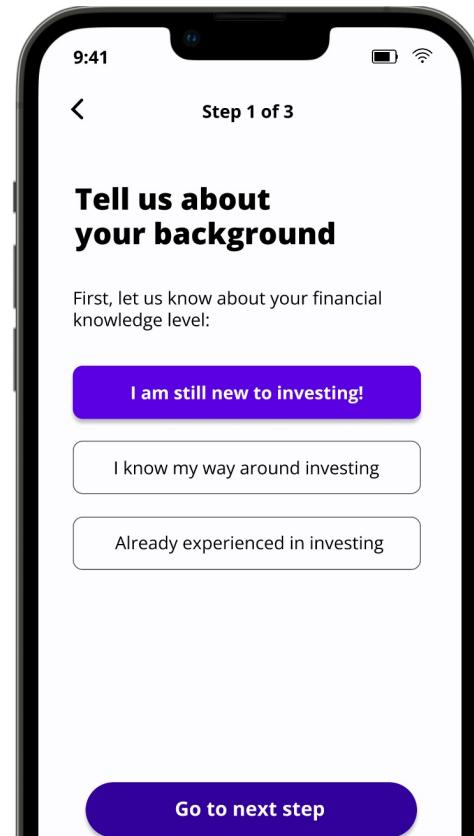
Users fill in “quiz-like” questionnaire on their financial background and preferences

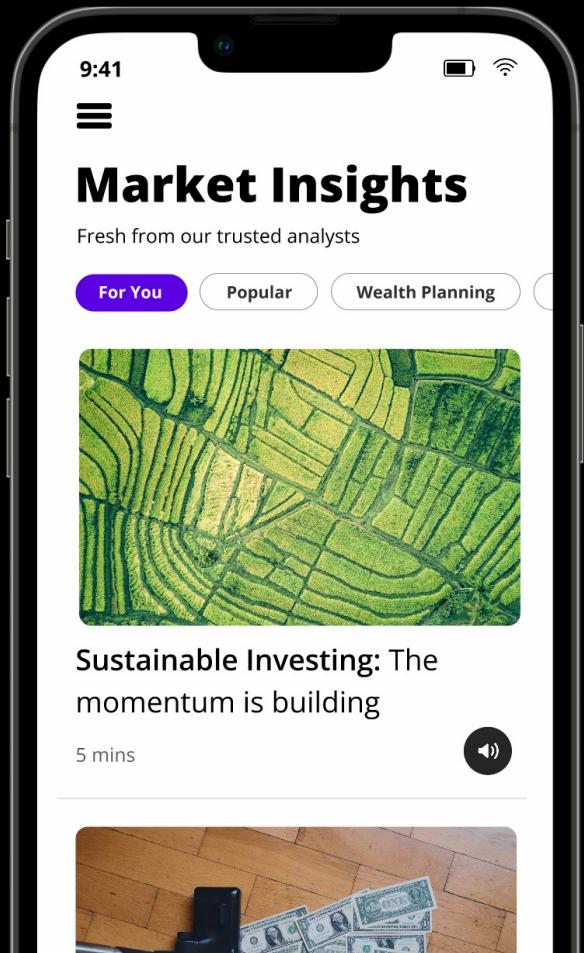
WHY?

The app will be personalized to each user’s background and self-directed investing needs

*Supports “Recommended Funds” and “Market Insights” features

BACKGROUND QUIZ





MARKET INSIGHTS

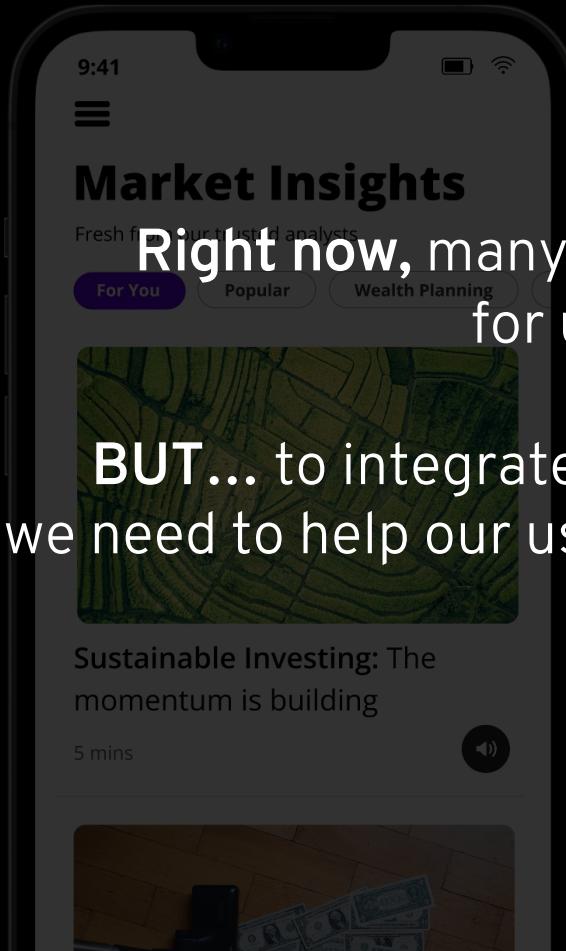
WHAT IS IT?

Users can get curated news and financial tips based on the quiz (***Include audio & estimated reading time**)

WHY?

Increase **time spent** on app & optimize learning process

Users learn how to make **better investment choices** → More likely to continue in **long run**



MARKET INSIGHTS

Right now, many apps exist **merely as a tool**
for users to invest

WHAT IS IT?

BUT... to integrate the app into our users' lives,
we need to help our users **grow and learn** alongside us

WHY?

Increase **time spent** on app & optimize
learning process

Users learn how to make **better investment
choices** → More likely to continue in **long run**

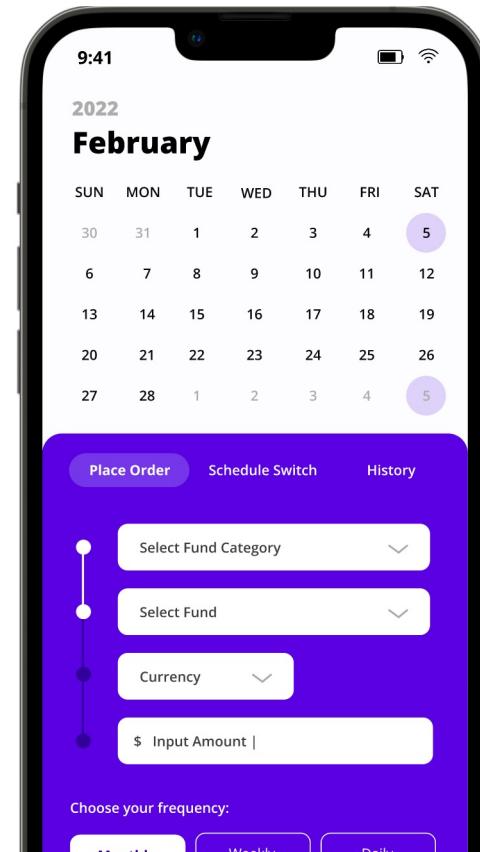
WHAT IS IT?

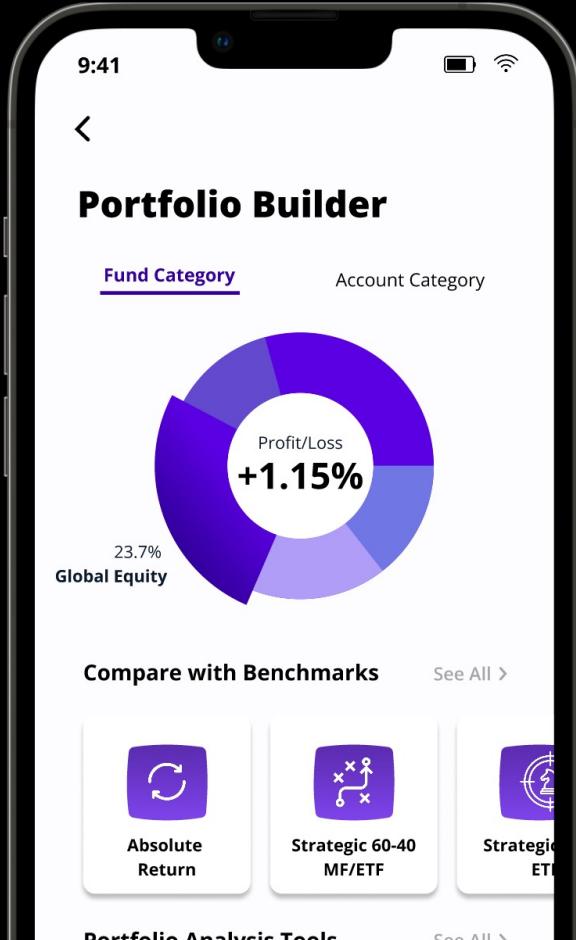
Incorporate JPM's current capabilities to set up
automatically repeated investments + Notifications
before every order

WHY?

Help users who are busy make **consistent investments**
over **long term** + Entice user **back to the app**

E-SCHEDULER





PORTFOLIO BUILDER

WHAT IS IT?

Provides JPM **benchmarks** for users who want to make a **quick comparison** & Incorporate JPM's **simplified portfolio analysis tools**

WHY?

Allow users to **personally optimize** their investment portfolio **with guidance**

→ Makes app more engaging and more likely to continue using app in long run

PART 3.

RE-ANALYSE

NEXT STEPS

With new knowledge from feedback and from further research, if **more time is given to implement design**, additional features to be included would be :

- **Personal Digital Assistant** with human-like **distinctive personality traits**
- Integrating personal assistant to other app features
- Adding **watchlist/ curated fund rankings**

02 OTHER WORKS

A quick look into my other UI/UX
and design works!

PINOCCHIO

PROBLEM

“Known as the **Hong Kong University of Stress & Tension**, HKUST is known as a university where students are under **high pressure** and suffer from **poor mental health**”



PROPOSED SOLUTION

”An **anonymous mental health online forum** website for students to **share their experiences** with mental health conditions and **support one another**”

PINOCCHIO

←

Welcome to Pinocchio

Start your journey with us



The community is a big family. Join us now.
Add our website to Home Screen by tapping 

Now to Pinocchio! Sign In 

< >   

←

Let's get started!

Come on in and join our community

ITSC Email

Choose a secret word

Invalid Email 



Choose your interests

As your heart desires

 Depression

 Motivation

 Exam Anxiety

 Social Anxiety

 PTSD

 Panic Disorder

 Eating Disorders

 All

→

≡

For You

 Look back

 Bookmarks

 Read stories
Delve into our stories of the good, the bad and the magical

 Write now
Write down your daily thoughts, for they are part of your alluring tale

Ask for Help 

PINOCCHIO: IMPACT

We succeeded in allowing our students to **share their worries and stories with each other**

The screenshots show a mobile application interface for "The Storybook".

Screenshot 1: A post from "pinocchio.sight.ust.hk" at 18:44. It features a title "The Storybook" and several user posts. One post by "Exam Anxiety" discusses exam anxiety, self-doubt, and life goals. Another post by "I hate exam anxiety" discusses nervousness about an exam. A third post by "Expectations and patriarchy" discusses being a student from an international background.

Screenshot 2: A post from "pinocchio.sight.ust.hk" at 18:44. It shows a user's post about depression, mentioning overwhelmed, overthinking, or depression. A reply from "HKUST Counseling" offers professional help.

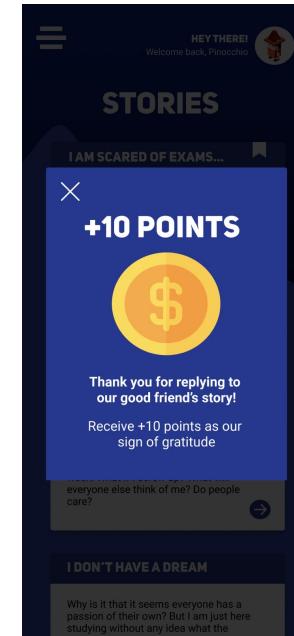
Screenshot 3: A post from "Pinocchio" at 18:44. It includes a reply from "Pinocchio" expressing good luck and support. Other posts include one about year 1 being harder than thought and another about social anxiety related to an interview.

Screenshot 4: A post from "pinocchio.sight.ust.hk" at 18:47. It shows a reply from "OCD... I am starting to" discussing OCD symptoms. Another reply from "Social Anxiety" discusses relapse and low self-esteem.

The interface includes navigation icons (back, forward, search, etc.) and a "Reader View Available" button.

PINOCCHIO: REVAMP

Gamification of Pinocchio to **increase user stickiness and retention rate** over long run



HEALTH CHECK KIOSK

PROBLEM

The Hong Kong government changes its COVID-19 health check procedures regularly

To implement this:

- **For employees:** Exposure to high-risk environment
- **For business owners:** Need to allocate extra labour for health check
- **For customers:** Inconvenient process



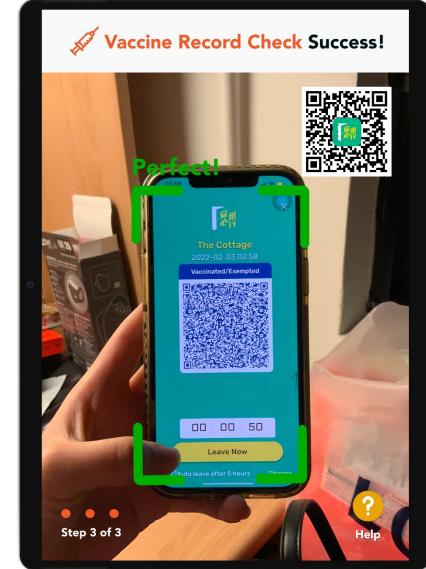
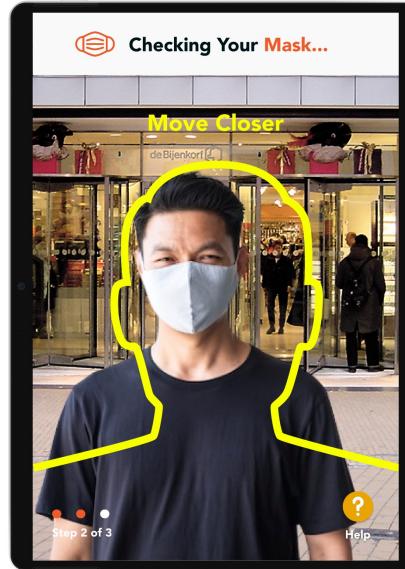
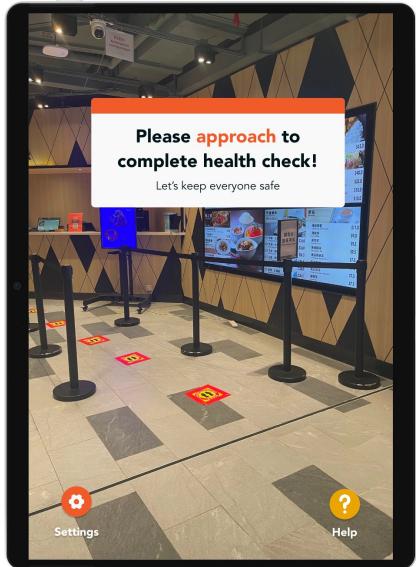
PROPOSED SOLUTION

A 7x24 **fully automated** & easy-to-configure **AI health detection kiosk** with:

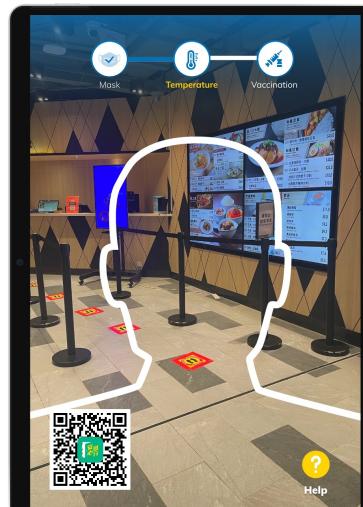
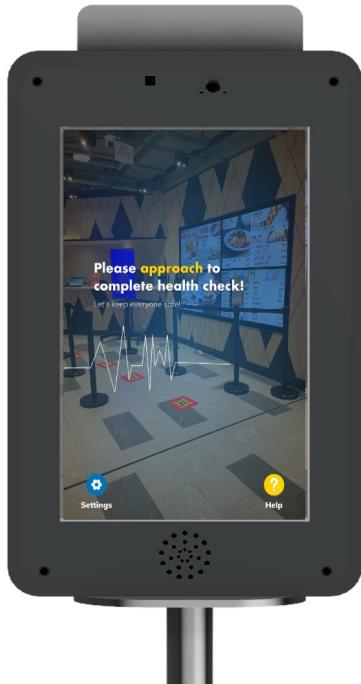
- Mask Detection
- Temperature Check
- Health Record Verification
- One-Tap RFID Scan

HEALTH CHECK KIOSK

User interface for health check kiosks
during COVID-19 pandemic



HEALTH CHECK KIOSK: REVAMPED



180DC INSTAGRAM POSTS

The collage consists of three vertical Instagram post screenshots:

- Post 1 (Left):** A grid of four profile pictures of the Leadership Team members: Tiffany Fung, Michelle Sutono, Kiki Lin, and Tiffany Yang. Below each photo is their name and title. The background is white with a green vertical bar on the left side.
- Post 2 (Middle):** A smartphone screen showing a countdown timer app. The screen displays "2 DAYS LEFT" in large green numbers. At the top, a notification says "Only 1 more day left until the end of application submission! Don't forget to submit your slide decks ASAP to join us!". The phone's status bar shows the time as 12:05.
- Post 3 (Right):** A dark-themed post featuring the 180Degrees logo and the text "180DC HKUST: AN INTRODUCTION WHO ARE WE? >>". Below this, a smaller text block reads: "We are a local branch of the world's largest university-based consultancy for non-profits and social enterprises operating in 35+ countries of 150+ branches."

[Link](#) to more graphic design work for 180DC HKUST