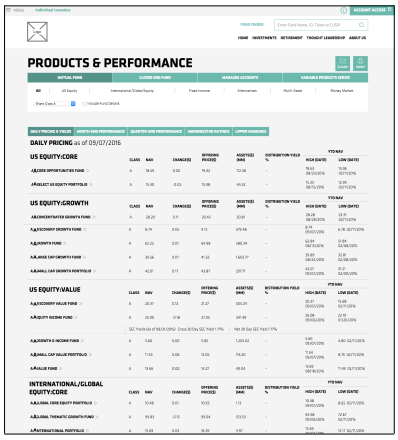
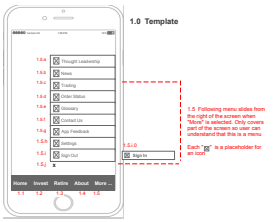


From Desktop ....to Mobile

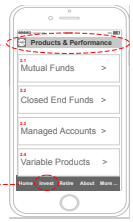


1.5 Following menu slides from the right of the screen when "More" is selected. Only covers part of the screen so user can understand that this is a menu

Each "pg" is a placeholder for an icon

Item	Trigger/CTA	Action	Source
1.1	Home	"Home" Illuminates, then Home page appears	Default
1.2	Invest	"Invest" Illuminates, then Invest page appears	Default or client file (if client activity)
1.3	Retire	"Retirement" Illuminates, then Retirement Home page appears	Default or client file (if client activity)
1.4	About	"About" Illuminates, then "About" page appears	Default
1.5	More	"More" Illuminates, then "More" menu appears on the right hand of the screen	Default
1.5.a	Thought Leadership	Thought Leadership page appears	Default
1.5.b	News	News page, per client file (designated via Bloomberg, Reuters)	General financial news from Bloomberg, Reuters
1.5.c	Trading	If client trades: Client trading activity appears, Otherwise default Trading page (excel) appear	Default or client file (if client activity)
1.5.d	Order Status	If client trades: Client order status & order status appears, Otherwise default Order page (excel) appear	Default or client file (if client activity)
1.5.e	Glossary	Dictionary of financial terms appears, along with search bar	Investopedia
1.5.f	Contact Us	Page of contact options appears, including phone & email input form & FAQs	Default
1.5.g	App Feedback	App Feedback input form appears	Default
1.5.h	Settings	List of options for user settings. Client designated appears, otherwise default	Default or client file (if client activity)
1.5.i.a 1.5.i.b	Sign Out	Sign out	Default
1.5.j	Close	"Close" menu closes	n/a

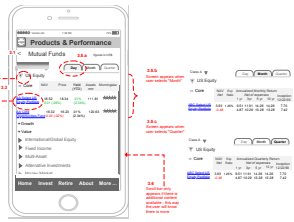
2.0 Products & Performance Main Menu



"Invest" or "Retire" will appear at the top if selected, and "Products" will appear here at the bottom.

Item	Trigger/CTA	Action	Source
2.1	Mutual Funds	"Mutual Fund" summary screen appears	Default
2.2	Close End Funds	"Close End Funds" summary screen appears	Default
2.3	Managed Accounts	"Managed Accounts" summary screen appears	Default
2.4	Variable Products	Variable Products summary screen appears	Default

3.0 Mutual Fund Screen



Item	Trigger/CTA	Action	Source
3.1	"Mutual Funds"	Item selection, previous page (2.0) appears	Default
3.2	Triangle/arrow	Fund categories appear, i.e. "Core", "Tactical"	Data Source (1)
3.3	"Core"	Fund included in that category appear	Data Source (1)
3.4	Name of fund	Summary screen for the fund	Fund data: Bloomberg
3.5.a	"Day" tab	"Day" tab is Illuminated, and Daily fund summary appears	Bloomberg
3.5.b	"Month" tab	"Month" tab is Illuminated, and Monthly fund summary appears	Bloomberg
3.5.c	"Quarter" tab	"Quarter" tab is Illuminated, and Quarterly fund summary appears	Bloomberg
3.6	Send tab	Send tab is Illuminated, and send drawer to enter screen	Default