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## Information Architecture

LINA – Full Path RIA

### Document History

| Date    | Version | Description   | Author |
|---------|---------|---|--------|
| 9/30/08 | .2      | ▪ Added navigation items to interface                       | MTV    |
| 10/9/08 | .3      | ▪ Made interface more generic for an international audience | MTV    |



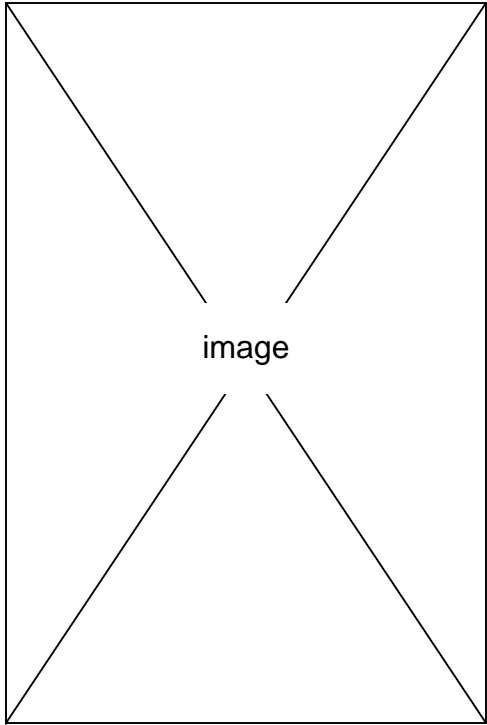
Notes

**1 [Animation]**

How does Term Life work? Includes clear definition of term, cover, and premium – also that the premium does not change through the entire length of the term.

# Plan Pointer

Save Profile



**Who You Are**

The Basics

First Name

Birth date

Gender  Male  Female

Height  ft.  in.

Weight  pounds

Annual Income \$

Save and continue

1

Chapter 1

Chapter 2

Chapter 3

Chapter 4

Chapter 5

Chapter 6

Chapter 7

Chapter 8

My Life

Who are you?

Who are you with?

What do you own?

What do you spend?

What do you do?

What do you owe?

Suggested Coverage

Get a Quote

10% complete

Notes

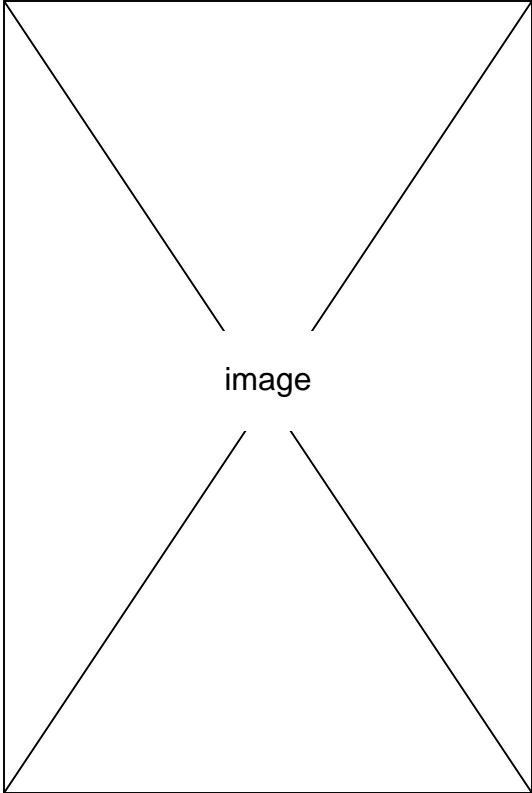
1

**[Animation]**

How your health affects your premium, but also the dangers of waiting until something is "fixed" or of getting a short term that will cause you to buy another policy when it'll be more expensive.

# Plan Pointer

Save Profile



image

**Who You Are**

Your Health  
Check all that apply.

- Tobacco/Nicotine Use
- High Cholesterol
- High Blood Pressure
- Heart Attack
- Stroke
- Cancer
- Diabetes
- Immune Disorder
- Confined to a hospital bed within last 2 years

Parents alive?  Yes  No

Siblings alive?  Yes  No

Parents healthy?  Yes  No

Siblings healthy?  Yes  No

Save and continue

1

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My Life

Who are you?

Who are you with?

What do you own?

What do you spend?

What do you do?

What do you owe?

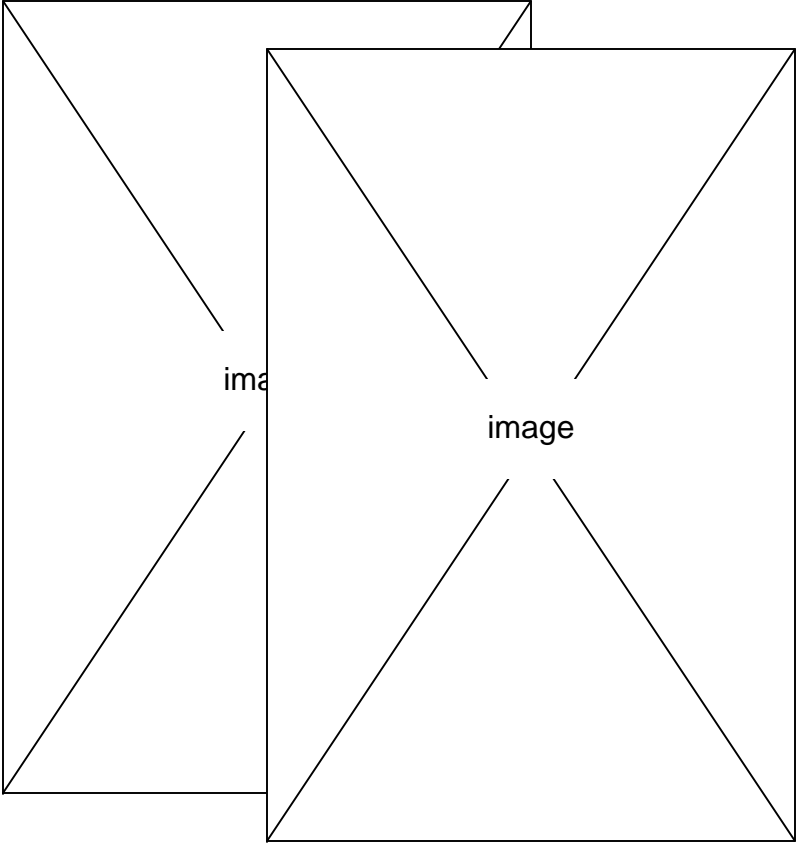
Suggested Coverage

Get a Quote

10% complete

Notes

# Plan Pointer



### Who Is With You?

**Partner**

Name

Gender  Male  Female

Birth date

Income \$  Year

I am interested in a policy for my partner also.  
[Why is this important?](#)

1

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My Life

○  
Who are you?

○  
Who are you with?

○  
What do you own?

○  
What do you spend?

○  
What do you do?

○  
What do you owe?

Suggested Coverage

Get a Quote

20% complete

**1 [Animation]**

The value of caregivers and homemakers (the estimated value of nannies, RNs, cooks, etc) and the reason that service value needs to be insured.

Notes

1

[Animation]

The expense of raising children

# Plan Pointer

Save Profile

1

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- Chapter 6
- Chapter 7
- Chapter 8

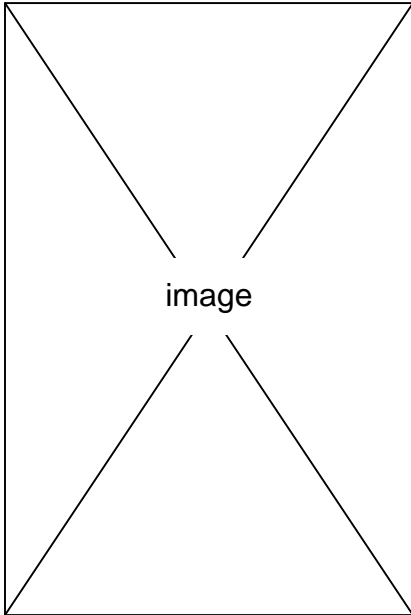
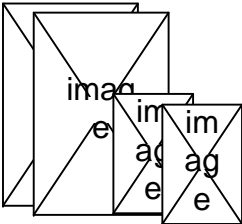
My Life

|                       |                       |                       |                       |                       |                       |                       |                    |             |              |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------|-------------|--------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | Suggested Coverage | Get a Quote | 20% complete |
| Who are you?          | Who are you with?     | What do you own?      | What do you spend?    | What do you do?       | What do you owe?      |                       |                    |             |              |

Notes

# Plan Pointer

Save Profile

1011 Willow Ave.

**What You Own?**

Do you own property?  
 Yes  No

Street Address

Mortgage remaining \$

Taxes & fees \$  Year

Other  Year

Done Save and add another property

1

Chapter 1  
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2

My Life

Who are you?

Who are you with?

What do you own?

What do you spend?

What do you do?

What do you owe?

Suggested Coverage

Get a Quote

30% complete

**1 [Animation]**

More info, better quote – illustrates how we'll use your expense profile to make sure that the cover you choose will truly protect your family

**2 [Graph]**

Introduction of graph view?

Notes

# Plan Pointer

Save Profile

**What do you spend?**

Automobiles

Payment/Lease \$  Year

Payment/Lease \$  Year

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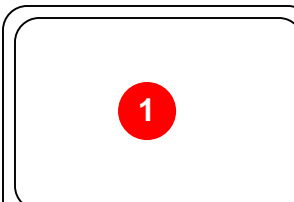
Rent \$  Year

Utilities \$  Year

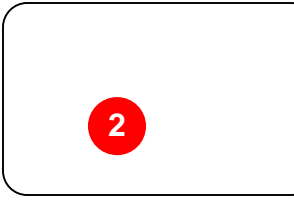
Groceries \$  Year

Pets \$  Year

Other \$  Year



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|         |                       |                       |                       |                                  |                       |                       |                    |             |   |
|---------|-----------------------|-----------------------|-----------------------|----------------------------------|-----------------------|-----------------------|--------------------|-------------|---|
| My Life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | Suggested Coverage | Get a Quote | <input type="button" value="40% complete"/> |
|         | Who are you?          | Who are you with?     | What do you own?      | What do you spend?               | What do you do?       | What do you owe?      |                    |             |   |

- 1 [Animation]**  
How the little things add up
  
- 2 [Graph]**  
Building to show addition of "spend" items

Notes

# Plan Pointer

Save Profile

**What do you do?**

Activities

Dining Out \$  Year

Entertainment \$  Year

Travel \$  Year

Other Activities \$  Year

**1**

Chapter 1  
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**2**

My Life

Who are you?

Who are you with?

What do you own?

What do you spend?

What do you do?

What do you owe?

Suggested Coverage

Get a Quote

50% complete

**1**

**[Graph]**

Show my financial balance

**2**

**[FAQ]**

How do we project stuff like education?

Notes

# Plan Pointer

Save Profile

Activities

Legal

### What do you do?

Have you been convicted or plead guilty of a criminal offense?  
 Yes  No

Have you had a DUI conviction in the past 5 years?  
 Yes  No

Done

1

Chapter 1  
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My Life

Who are you?

Who are you with?

What do you own?

What do you spend?

What do you do?

What do you owe?

Suggested Coverage

Get a Quote

50% complete

1

[Graph]

Show my financial balance

Notes

# Plan Pointer

Save Profile

**What do you owe?**

Student Loans \$

Equity \$

Line of Credit \$

Credit Cards \$

Other \$

Done

calculator

1

Chapter 1  
Chapter 2  
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Chapter 5  
Chapter 6  
Chapter 7  
Chapter 8

2

|         |                       |                       |                       |                       |                       |                                  |                    |             |              |
|---------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|--------------------|-------------|--------------|
| My Life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | Suggested Coverage | Get a Quote | 60% complete |
|         | Who are you?          | Who are you with?     | What do you own?      | What do you spend?    | What do you do?       | What do you owe?                 |                    |             |              |

1

**[Animation]**

First instance where there's no new animation

2

**[Graph]**

Graph build to include "Owe"

Notes

1

[Graph]

Tabbed graphs of my financial spectrum?

# Plan Pointer

Save Profile

### Suggested Coverage

Based on the information you have provided, we recommend a policy of

**Coverage: \$1.2 million**  
**Term: 30 year term**

[How did you get this?](#)

I'd like to see a quote

I'd like to set my own coverage

I'd like to modify my expenses

1

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|         |                       |                       |                       |                       |                       |                       |                    |             |              |
|---------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------|-------------|--------------|
| My Life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | Suggested Coverage | Get a Quote | 10% complete |
|         | Who are you?          | Who are you with?     | What do you own?      | What do you spend?    | What do you do?       | What do you owe?      |                    |             |              |

Notes

# Plan Pointer

Save Profile

**Get a Quote**

Based on the information you have provided, we recommend a policy of

**Coverage: \$1.2 million**  
**Term: 30 year term**  
**Premium: \$79/month**

1

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Chapter 4  
Chapter 5  
Chapter 6  
Chapter 7  
Chapter 8

2

My Life

|              |                   |                  |                    |                 |                  |
|--------------|-------------------|------------------|--------------------|-----------------|------------------|
| Who are you? | Who are you with? | What do you own? | What do you spend? | What do you do? | What do you owe? |
|--------------|-------------------|------------------|--------------------|-----------------|------------------|

Suggested Coverage **Get a Quote** 10% complete

1

**[Graph]**

Tabbed graphs of my financial spectrum?

2

**[Animation]**

Feel the Burn

3

Bar graphs allowing you to set your own term and cover? ONE suggestion from us.

Notes

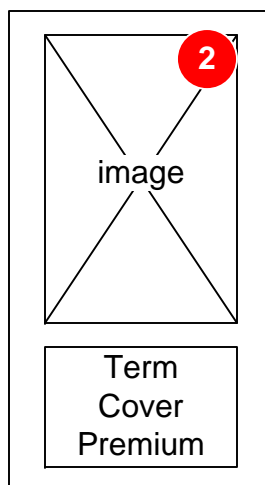
# Plan Pointer

Save Profile

1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris pharetra vestibulum odio. Nullam ante. Proin blandit luctus leo. Morbi ut dolor. Donec sapien pede, facilisis et, aliquam consequat, placerat sit amet, risus. Fusce orci nisl, fringilla bibendum, sollicitudin vel, bibendum nec, erat. Proin lobortis arcu ac metus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam aliquet tempor urna. Duis interdum dictum ipsum. Donec lectus eros, feugiat a, suscipit non, elementum nec, nisi. Vivamus sollicitudin nunc. Cras neque tortor, posuere a, hendrerit ac, vulputate nec, felis. Duis ultricies. Proin sapien pede, tincidunt a, adipiscing sed, laoreet sed, nisi. Donec quam mauris, congue in, tristique sit amet, cursus ut, metus

2



Duis id dui at eros auctor ornare. Quisque est. In quis urna eget massa ornare mollis. Nullam dapibus augue quis orci. Sed lacinia tellus vel eros. Duis velit urna, volutpat eget, interdum nec, vehicula eu, nulla. Phasellus pharetra, urna eget pellentesque mattis, nibh pede rutrum pede, vitae accumsan dolor enim in neque.

3

Save and Check

Just Save, thanks

|         |                       |                       |                       |                       |                       |                       |                    |             |              |
|---------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------|-------------|--------------|
| My Life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | Suggested Coverage | Get a Quote | 10% complete |
|         | Who are you?          | Who are you with?     | What do you own?      | What do you spend?    | What do you do?       | What do you owe?      |                    |             |              |

- 1 Save info -- we'll send you an email with your password to get back into the application.
- 2 Your icon(s), with policy, cover, etc – imagery continued in email sent and in application half of RIA
- 3 Opt-in for HIPAA check, to “check if you qualify for accelerated underwriting”

Notes

# Plan Pointer

Logoff

1

X

Term  
Cover  
Premium

2

MyLife

|              |                   |                  |                    |                 |                  |
|--------------|-------------------|------------------|--------------------|-----------------|------------------|
| ○            | ○                 | ○                | ○                  | ○               | ○                |
| Who are you? | Who are you with? | What do you own? | What do you spend? | What do you do? | What do you owe? |

Suggested Coverage

Get a Quote

Purchase Insurance

10% complete

1

**[Graph]**

Print or Save Package of Your Graphs

2

**[FAQ]**

Reassurance on going around, talking to friends, checking with other sources, then coming back to take up where they left off. If you've not done it yet, save in the upper right hand corner.