Yu Xi Ng Structures

Asset lists AI: drive folder here

Asset Inventory:

Visuals:

- Logos (Vanguard, Digital Advisor)
- Background images (charts, graphs, financial landscapes)
- Icons (for settings, goals, investment options, account information)
- Progress bars (investment progress towards goals)
- Buttons (login, submit, view statements, rebalance)
- User profile icon
- Investment portfolio overview
- Portfolio performance chart
- Asset allocation pie chart
- Trending assets carousel
- Virtual trading simulator

Informational Content:

- Text explaining investment strategies, asset allocation, risk tolerance
- FAQs (Frequently Asked Questions) about the service and fees
- Educational articles about investing basics and long-term goals
- User account information dashboards (balances, performance charts)
- Performance reports (showing historical returns and risk metrics)
- Market news feed
- Economic calendar
- Investment education videos
- Investment glossary
- Asset research reports
- Analyst recommendation ratings
- User feedback and ratings
- Email subscription forms
- Investment newsletter archives
- Regulatory disclosures
- Terms of service agreements
- Privacy policy documents
- Financial planning tools
- Investment tax resources

Interactive Elements:

- Forms (for initial risk assessment, goal setting, contribution scheduling)
- Drop-down menus (for selecting investment options, account types)
- Calendars (for scheduling automatic deposits or rebalancing)
- Knowledge base search bars (to find answers to specific questions)
- Chat windows (for contacting customer support)
- Watchlist icon
- Watchlist table
- Search bar for assets
- Top gainers list
- Top losers list
- Investment goal setting module
- Risk tolerance assessment
- Investment strategy selector
- Portfolio rebalancing button
- Funding account buttons
- Withdrawal request form
- Notification bell icon
- Investment calculators
- Portfolio analysis reports
- Investment themes explorer
- Sustainable investing filters
- Investment blog section
- Referral program banner
- Investment order form
- Stop-loss/take-profit tools
- Portfolio tracking watchlists
- Asset comparison tools
- Diversification score
- Portfolio stress testing
- Tax-loss harvesting tools
- Dividend reinvestment settings
- Asset screening filters
- Investment idea generation
- Goal-based investing tools
- Retirement planning calculators
- Education savings accounts

- Charitable giving accounts
- Cryptocurrency portfolios
- Alternative investment options
- Robo-advisor configuration
- Social sharing buttons
- Account aggregation tools
- Investment APIs and integrations
- Mobile app download links
- Investment coaching services

Accessibility Features:

- Screen reader compatibility for visually impaired users
- High-contrast themes for users with visual impairments
- Keyboard navigation for easy access without a mouse
- Language and regional settings
- Accessibility options
- User onboarding tutorials

Additional Assets:

- Legal disclaimers and terms of service documents
- Security certificates (to ensure data encryption and user privacy)
- Loading spinners and progress indicators (while information is loading)
- Data (not directly accessible to users):
- Account security settings
- Two-factor authentication setup
- Transaction history log
- Global market data
- Investment community forums

User account data (investment holdings, personal information)
Market data feeds (stock prices, bond yields, economic indicators)
Security algorithms (for portfolio optimization and risk management)

Card Sorting

– Narrowing Down Asset List:

1. Investment portfolio overview

2. Portfolio performance chart
3. FAQ
4. Investment glossary
5. Analyst recommendations
6. User feedback and ratings
7. Financial planning tools
8. Chat windows
9. Goal setting models
10. Portfolio analysis reports
11. Asset comparison tools
12. Diversification score
13. Retirement planning calculator
14. Alternative investment options
15. Investment coaching services
16. Language and regional settings
17. Accessibility options
18. User onboarding tutorials
19. User account data
20. Market data feeds

Initial Card Sort (+ an additional participant card sort due to the first card sort website not letting me do more than 2)

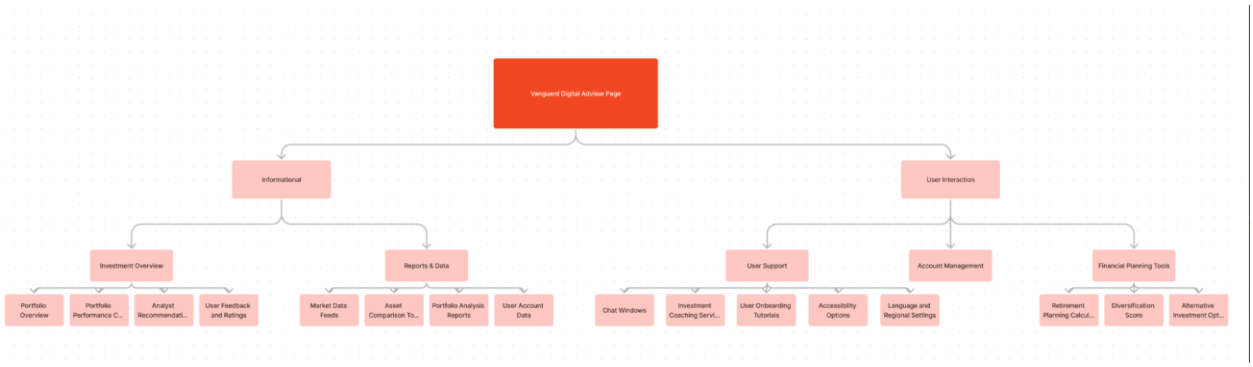
CARD	SORTED INTO		AGREEMENT SCORE
Portfolio performance chart	Visuals	2 times	100%
Investment portfolio overview	Informational Content	2 times	100%
Analyst recommendations	Informational Content	2 times	100%
User account data	Informational Content	2 times	100%
Portfolio analysis reports	Informational Content	2 times	100%
FAQ	Informational Content	2 times	100%
Chat windows	Interactive Elements	2 times	100%
User feedback and ratings	Interactive Elements	2 times	100%
Asset comparison tools	Interactive Elements	2 times	100%
Goal setting models	Interactive Elements	2 times	100%

Participant Card Sort (view full file here)

xixi-ng-mejo581-vanguard-card-sort-

card_id	card_label	category_id	category_label	user_id
1	Diversification score	1	Informational Content	1
2	Portfolio performance chart	1	Informational Content	1
3	User feedback and ratings	1	Informational Content	1
4	Analyst recommendations	1	Informational Content	1
5	User account data	1	Informational Content	1
6	Portfolio analysis reports	1	Informational Content	1
7	Investment portfolio overview	1	Informational Content	1
8	FAQ	1	Informational Content	1
9	Market data feeds	1	Informational Content	1
10	Investment glossary	1	Informational Content	1
11	Retirement planning calculator	2	Interactive Elements	1
12	Alternative investment options	2	Interactive Elements	1
13	Goal setting models	2	Interactive Elements	1
14	Asset comparison tools	2	Interactive Elements	1
15	Investment coaching services	2	Interactive Elements	1
16	Accessibility options	3	Accessibility Features	1
17	User onboarding tutorials	3	Accessibility Features	1
18	Language and regional settings	3	Accessibility Features	1
19	Chat windows	4	Visuals	1
9	Market data feeds	4	Visuals	2
6	Portfolio analysis reports	4	Visuals	2

Content Hierarchy Chart (view figma link here)



Flowcharts:
https://www.figma.com/file/REcxiCLSxHGMad5gaIdxpM/Untitled?type=whiteboard&node-id=0%3A1&t=yhSC15ynL8I9i99z-1

Reflection:

This assignment was exciting, as I've never done card sorting before for a UX project. I like how AI provides a list of possible assets that I probably would not have come up with, even when looking through the Vanguard dashboard. Since the dashboard is very limited to what we can do since it's not a real account, I had more trouble coming up with the third flow chart as I cannot make many interactive decisions based on the prototype. Therefore, I'd assume the third flowchart would happen if we were allowed to allocate funds and invest through the dashboard.