

Designing first mobile app for advisor users in 4 weeks for leading Wealth Management firm

Key Challenges



- Lack of a unified platform for advisor users to view investor portfolios, and make recommendations
- Clients of Advisors lacked a long-term perspective on outcomes, leading to reactive responses.
- Complicated Information Architecture and legacy database constraints caused the lack of context for users

Business Solution



- Thorough research on 10+ competitor apps, Whitepapers, PRs, videos, etc. in the wealth management & financial industries to gain insights & context
- Analyzed the Information Architecture to simplify amount of similar screens, while increasing context for users
- Suggested performance improvements to handle constraints of the client's legacy database

Business Impact



Helped Investor users with simpler visualizations and cleaner data tables

Helped Advisor users by showing a clear client list and an exact copy of what investors see

Enhanced user engagement & accessibility along with clarity within large amounts of data

Simplified multiple screens into one, with added context in 4 weeks



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