## **AXA** Equitable

# **SCS iPad App**





### Concept 1 **SLIDERS**

PRACTICAL Approach

Users are encouraged to interact with a tool that allows them to vary their market risk tolerance (index), return horizon (term), and protection comfort level (buffer)—ultimately providing a "best match" for their investment style.

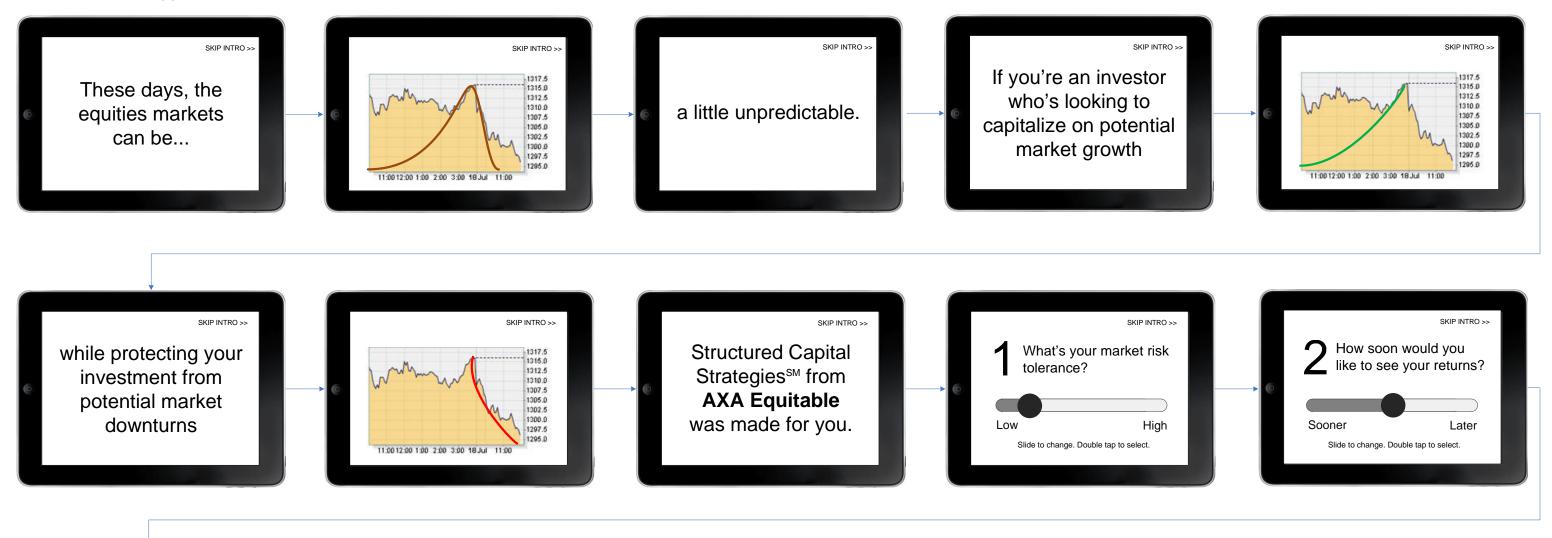


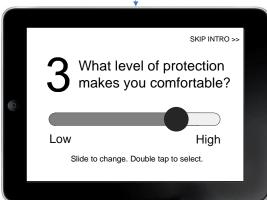


Intro Frames

0.0

Introduction approx. 45" - 60"





From here, user is taken to the heart of the experience - "Which Option is Best for Me?", where a "best match" is preselected based on their input. From here, users can fluidly explore all options and get more info about the indices, the SCS product, and AXA Equitable. (See next slide).







Selection is pre-populated based on "intro" inputs. If user were to "skip" intro and navigate here, option would be:

IF first use = TBD default selection/option IF repeat visit = last selections IF from "saved" option = saved selection for corresponding profile

User can move either the sliders or scroll through applicable, available options, with each one affecting the other (per TBD "results" mapping).







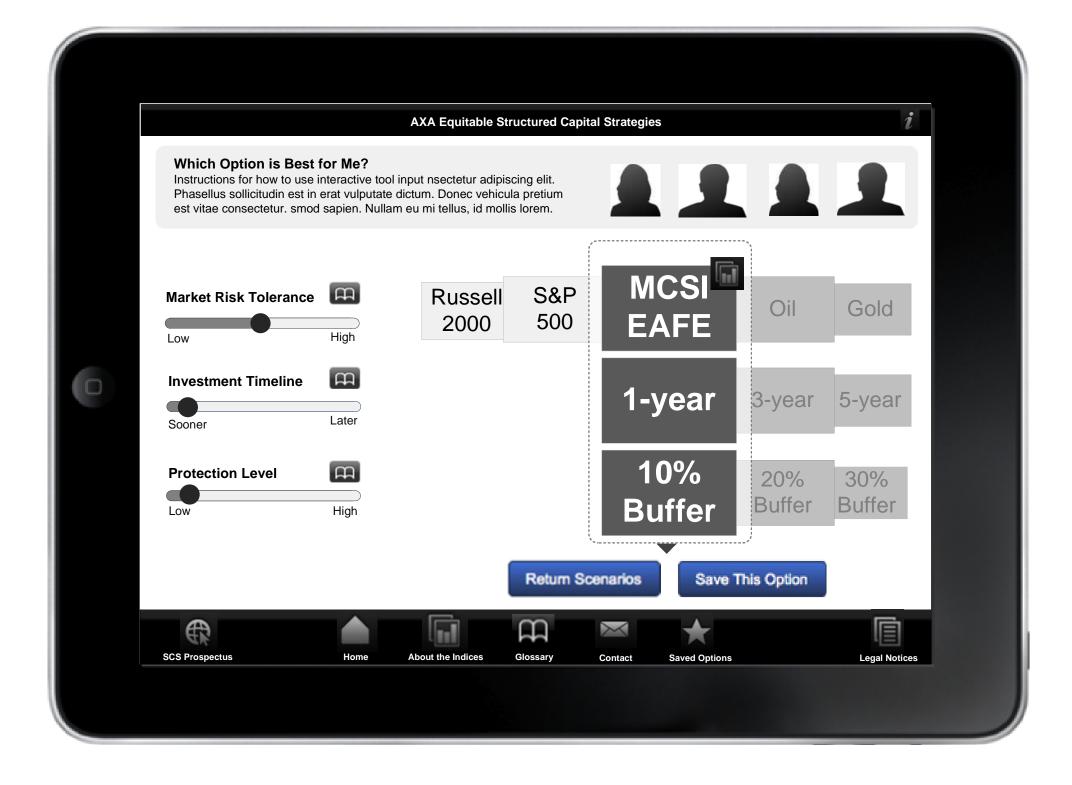
















1.0.3

3.0

Glossary







# Concept 2 JUMP BACK IN

EMOTIONAL Approach

Give apprehensive investors a reason to "get back in game" by offering a new way to invest in the markets with confidence via Structured Capital Strategies.

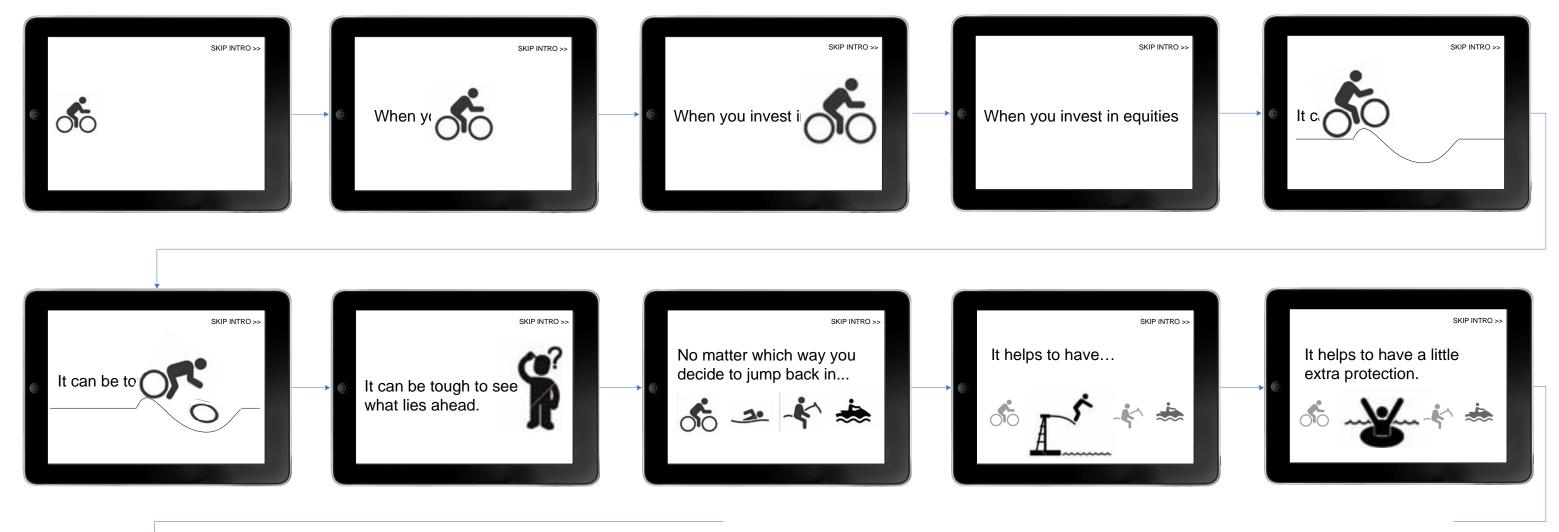




Intro Frames

0.0

Introduction approx. 45" - 60"





Each image animates in turn to reveal a "safer" way to approach the activity (e.g. biker hits the road again with helmet, swimmer dives in with float, rider gets back on horse with helmet/boots, water skiing zooms off with life vest) – activities/= TBD. **NOTE: need to find "Safe" images!** 

Each "safe" icon then gets paired with an investor profile/characteristic, which is played out throughout the experience (as illustrated on next slides).





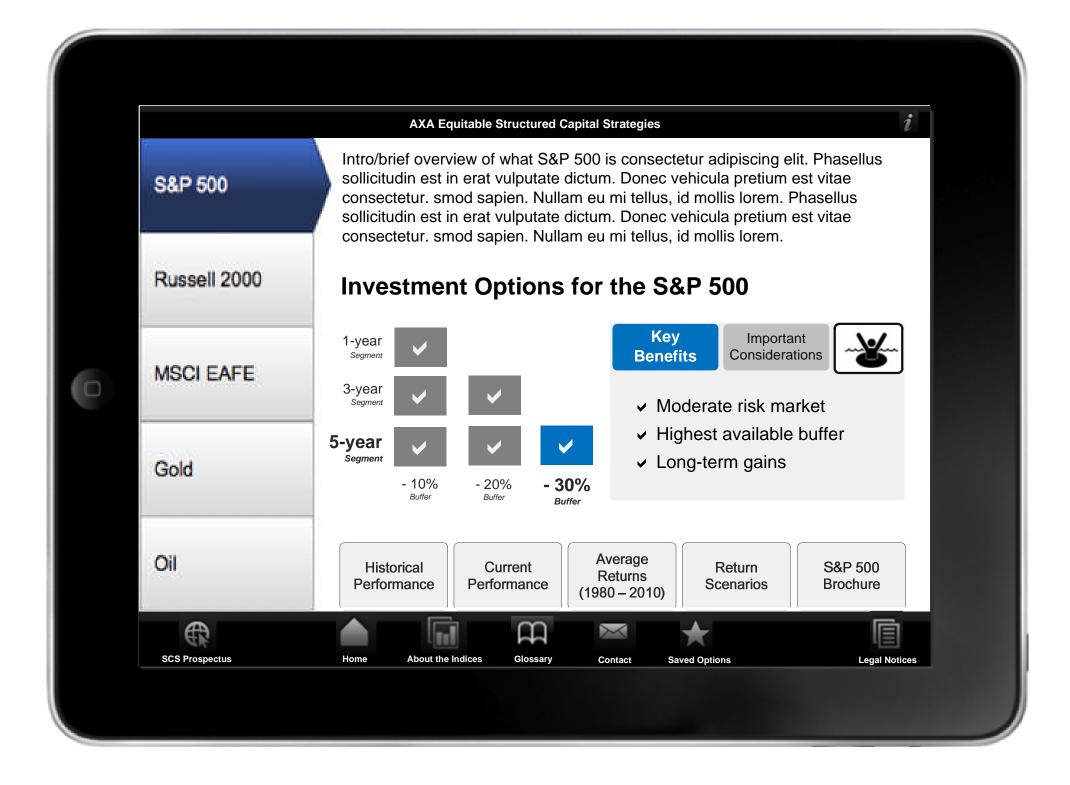
**S&P 500** (About the Indices)







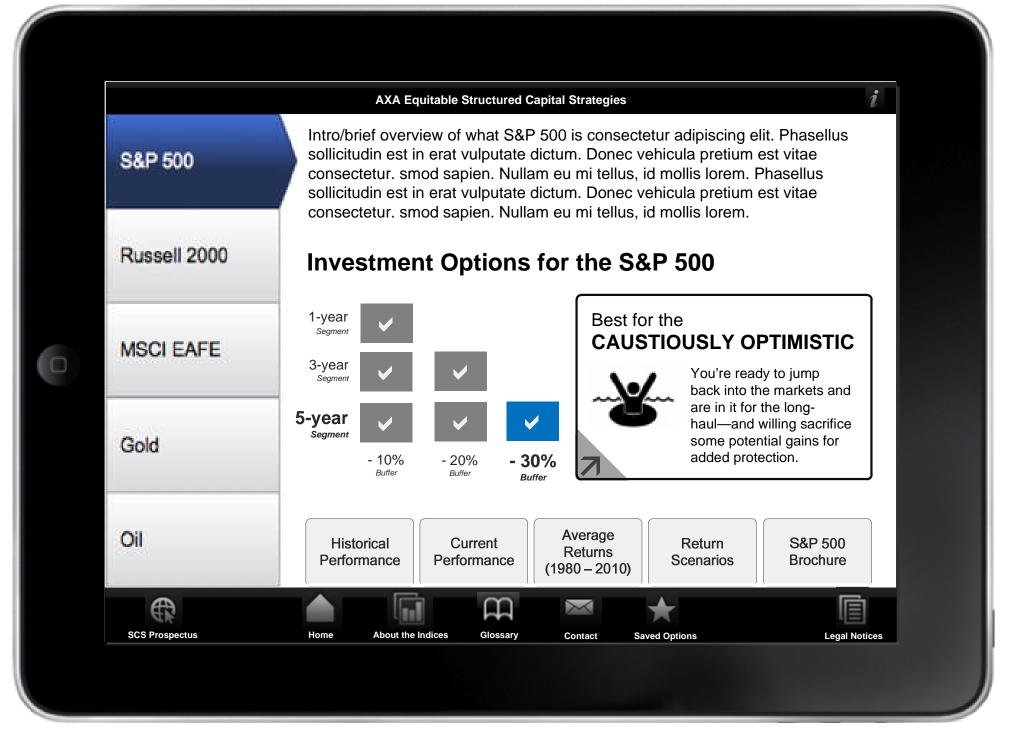
**S&P 500** (About the Indices)







**S&P 500** (About the Indices)



The idea here is to map one of the four "safe" investor personas (per AXA's docs), for example:

SWIMMER = David WATERSKIIER = Tom HORSEBACK RIDER = Susan BIKER = Gary

Matches to options + copy TBD.





2.3.1.1

S&P 500 Historical Chart (About the Indices)







2.3.1.1

S&P 500 Historical Chart (About the Indices)



On touch, user can scroll.





**AXA Equitable Structured Capital Strategies S&P 500** << Overview Average Historical Current S&P 500 Return Returns Performance Brochure Performance Scenarios (1980 - 2010)S&P 500: 1979-2009 1600 The S&P 500° is broken down into several sectors, some of 1400 which include: Consumer Staples 1200 Energy 1000 Financials Health Care 800 Industrials Information Technology 600 Telecommunication Services 400 200 1985 1990 1995 2000 2005 2009 As shown in the chart, the S&P 500® has made noteworthy gains since 1979. It reach all-time highs, topping 1,500 in trading in March of 2000 and again in July of 2007, after a major downturn in 2002. The same pattern held true in 2008, when the S&P fell significantly, only to rebound and show gains in 2009, illustrating the strong potential for market recovery. Legal Notices



S&P 500 **Historical Chart** (About the Indices)





### Concept 3

# **SCS 101**

EDUCATIONAL Approach

Users are encouraged to "learn a new way of investing"—taking the "SCS 101" course to see how Structured Capital Strategies offers smart, new options (with greater protection) for a new world of equities investing (with greater risk).

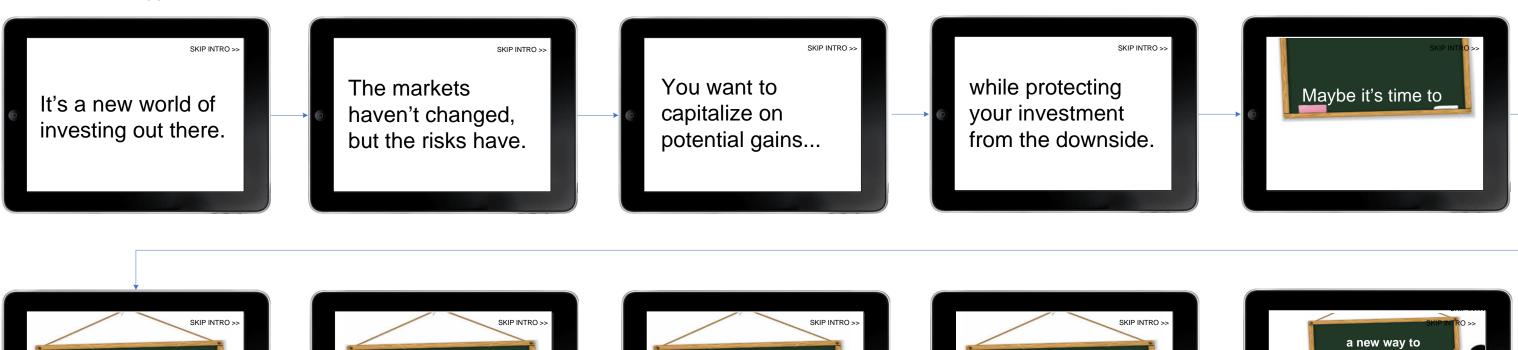




Intro Frames

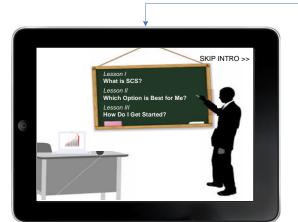
0.0

Introduction approx. 45" - 60"



from AXA

Equitable



Maybe it's time to

learn a new way to

invest.

Resolve on SCS APP HOME (see next slide)

Structured

Capital

**Strategies** 





a new way to

invest, for a new

world of investing.

invest, for a new

world of investing.

SCS APP HOME



Organically populate "touchable" items into scene for the following key interactive/transactional areas of the experience.



**About the Indices** 

TBD Image/Element
Interactive Hypothetical Chart

TBD Image/Element
Which Option is Best for Me

TBD Image/Element
Contact/Lead Gen Form

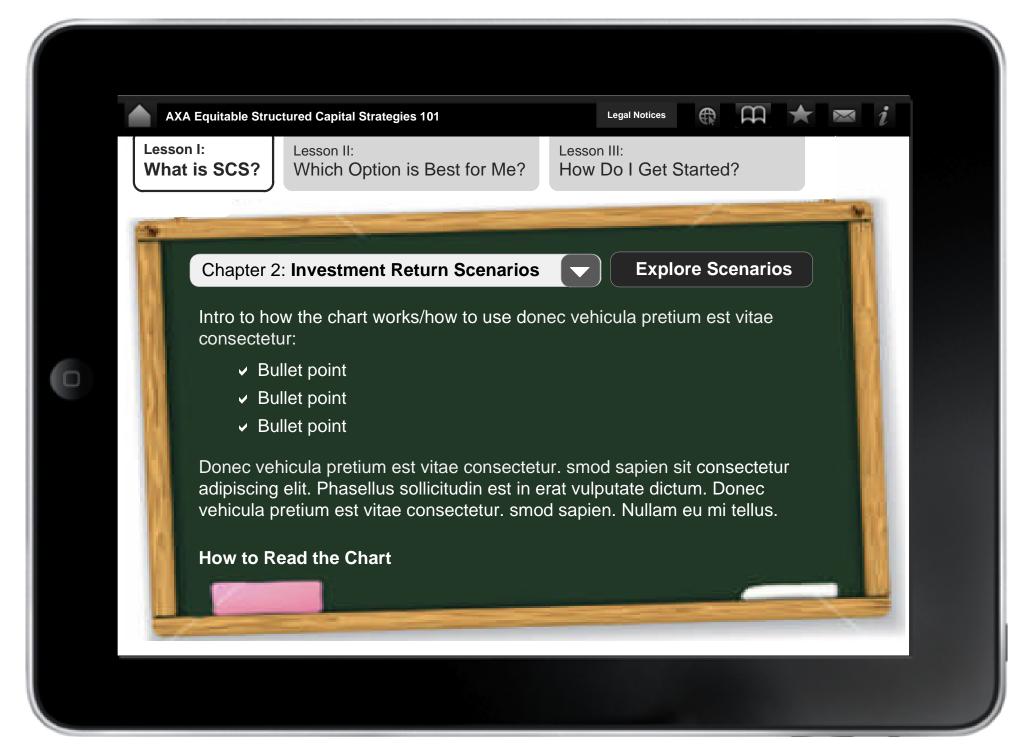
TBD Image/Element **SCS Video** 

TBD Image/Element Saved Options

The user can navigate through the "lessons" or jump right into one of the key interactive/transactional areas.







From the intro, the user can navigate through the "lessons" or jump right into one of the key interactive/transactional areas.

Each of the "lessons" corresponds to the main sections of the experience (2.0, 3.0, 4.0).

"Chapters" within each lesson correspond to the subsections (2.1, 3.1, 4.1, etc.), which can be accessed using the pulldown control.

In this case, the user has organically navigated to the Interactive Hyptothetical Chart (aka "Investment Return Scenarios") lesson.

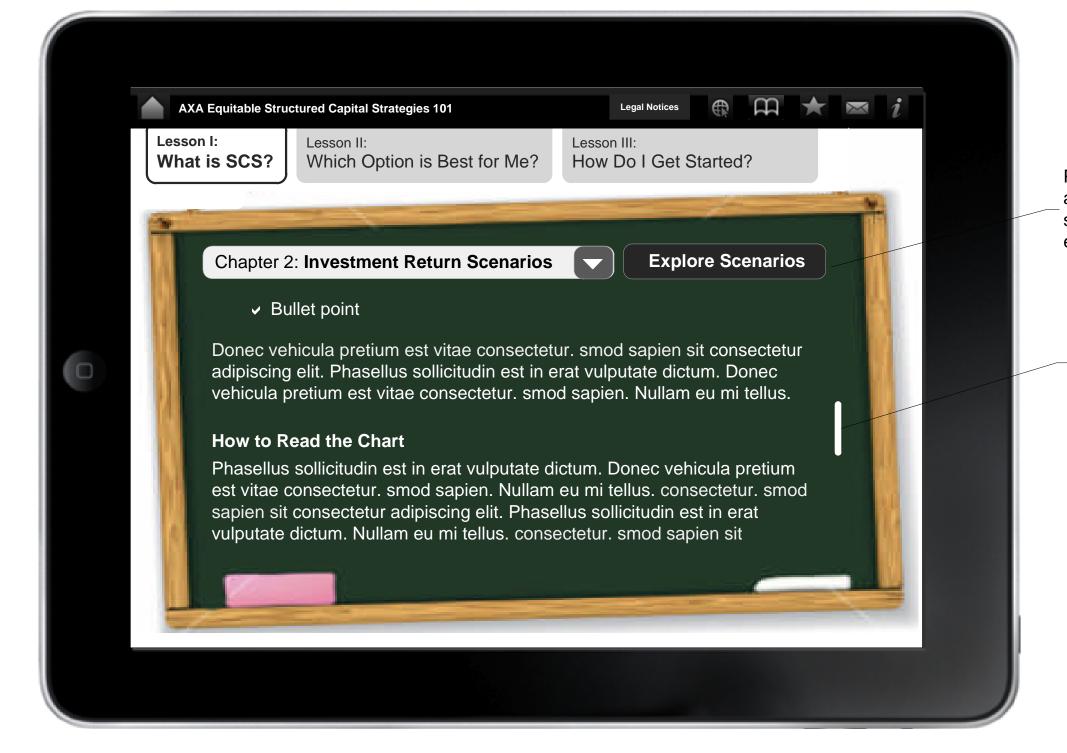




Interactive

2.2

Hypothetical Chart

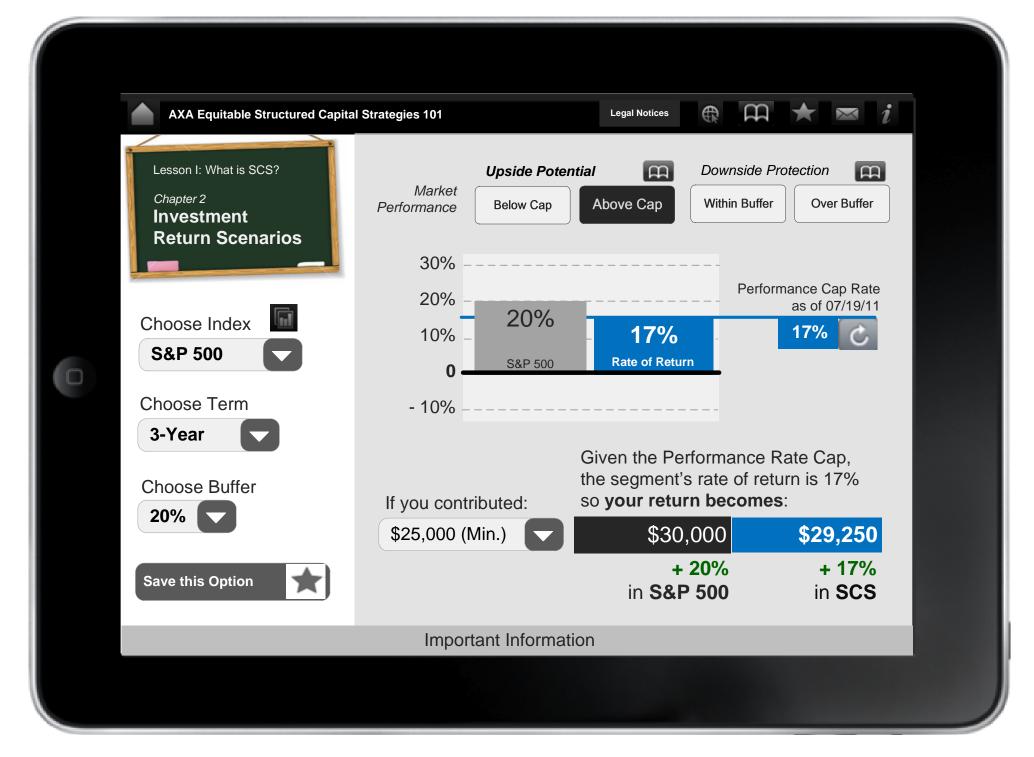


Prominent controls in each lesson allow user to "deep dive" into supporting key interactive areas of the experience.

On touch, user can scroll.







In this case, the user has selected "Explore Scenarios" from the Interactive Hyptothetical Chart (aka "Investment Return Scenarios") lesson.

Selections are pre-populated as follows:

IF first use = TBD default selection/ option

IF repeat visit / coming from "Which Option is Best For Me?" = last corresponding selections

IF from "saved" option = saved selection for corresponding profile

User can change parameters (with each selection affecting other available options) and can "save" any option not already saved.

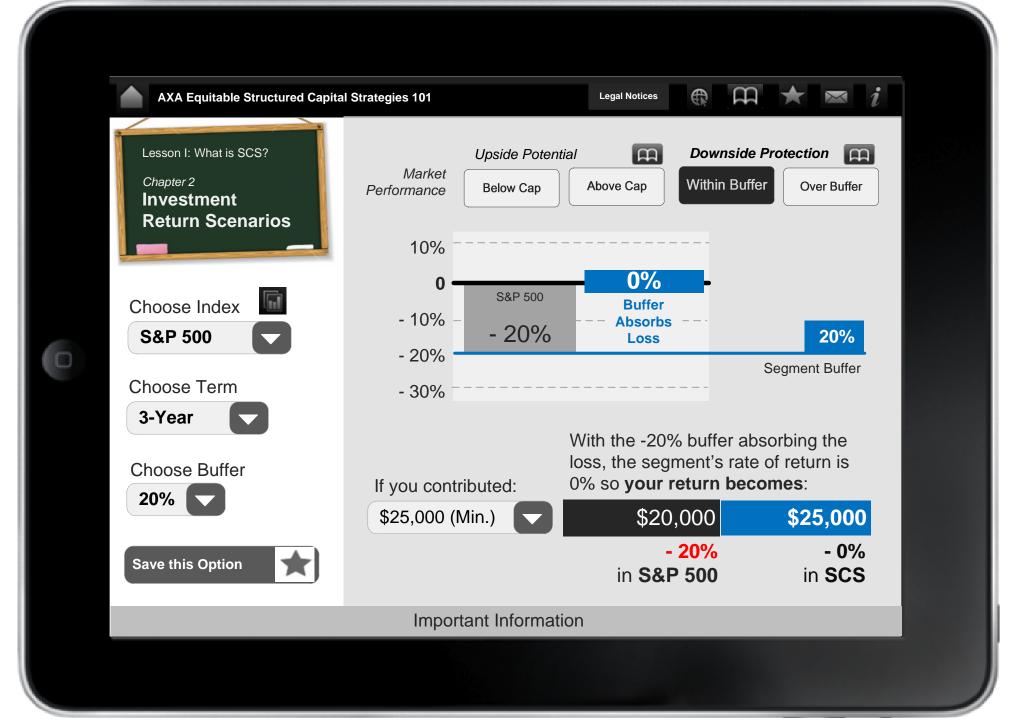
User can select hypothetical "Contribution" amounts to see how scenario would play out with a real investment—ultimately showing what that investment would turn in to (e.g. \$30,000, -\$10,000)

Default = TBD (Minimum contribution value shown here)





2.2



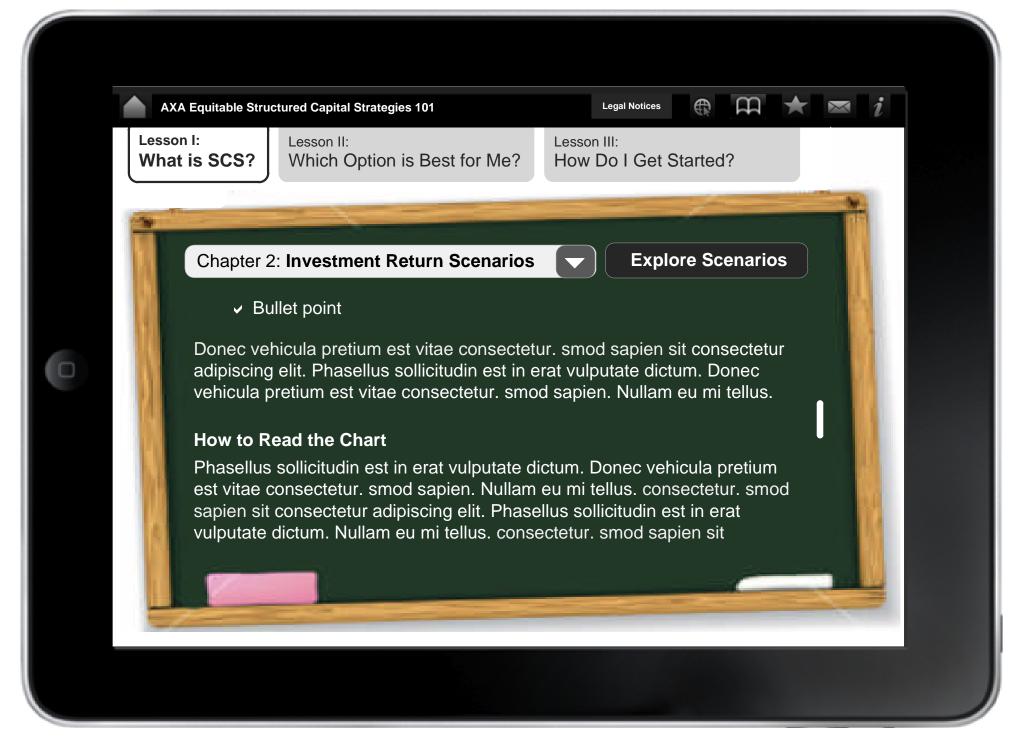
This area is essentially a window containing the "hypothetical chart" functionality – the "viewable" area of the chart depends on the current view (rolls to loss scenario when "Downside Protection" scenarios are selected, rolls to profit scenarios when "Upside Potential" scenarios are selected).

Conversely, from the "deep dive" key interactive areas, the user can click the chalkboard in the upper lefthand corner to return back to where s/he left off in the "lessons" area.





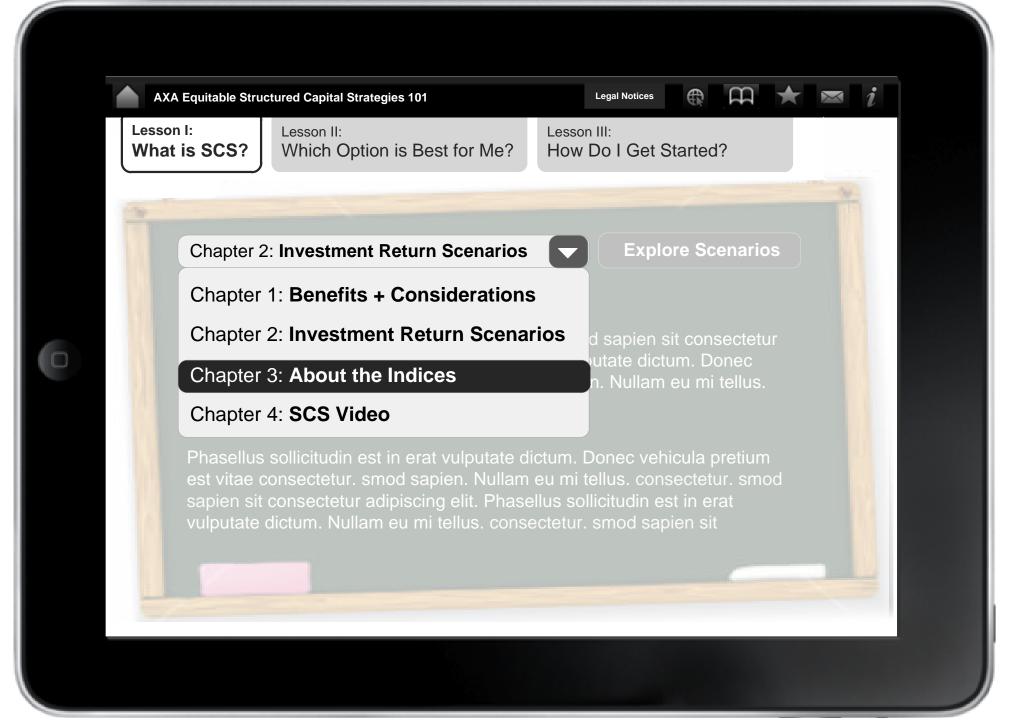
2.2



Conversely, from the "deep dive" key interactive areas, the user can click the chalkboard in the upper lefthand corner to return back to where s/he left off in the "lessons" area.







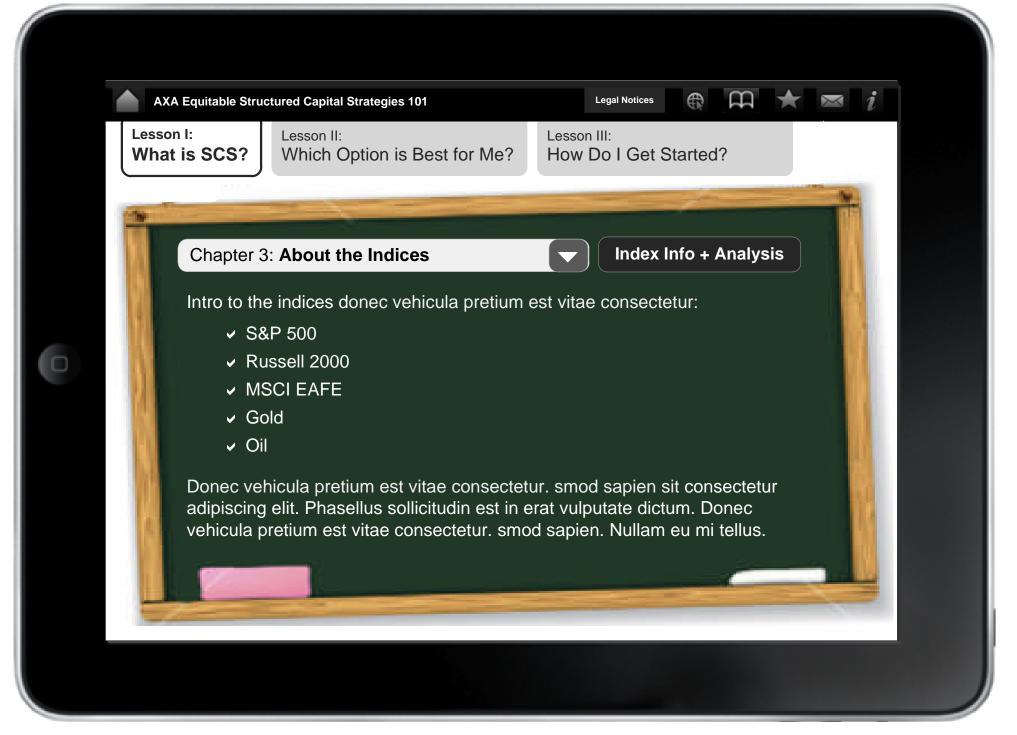
When applicable, within each lesson are "chapters" that correspond to the subsections of the experience (2.1., 3.1., 4.1., etc.).

The user can use the pulldown control to navigate to the various "chapters" in a given "lesson".





About the Indices



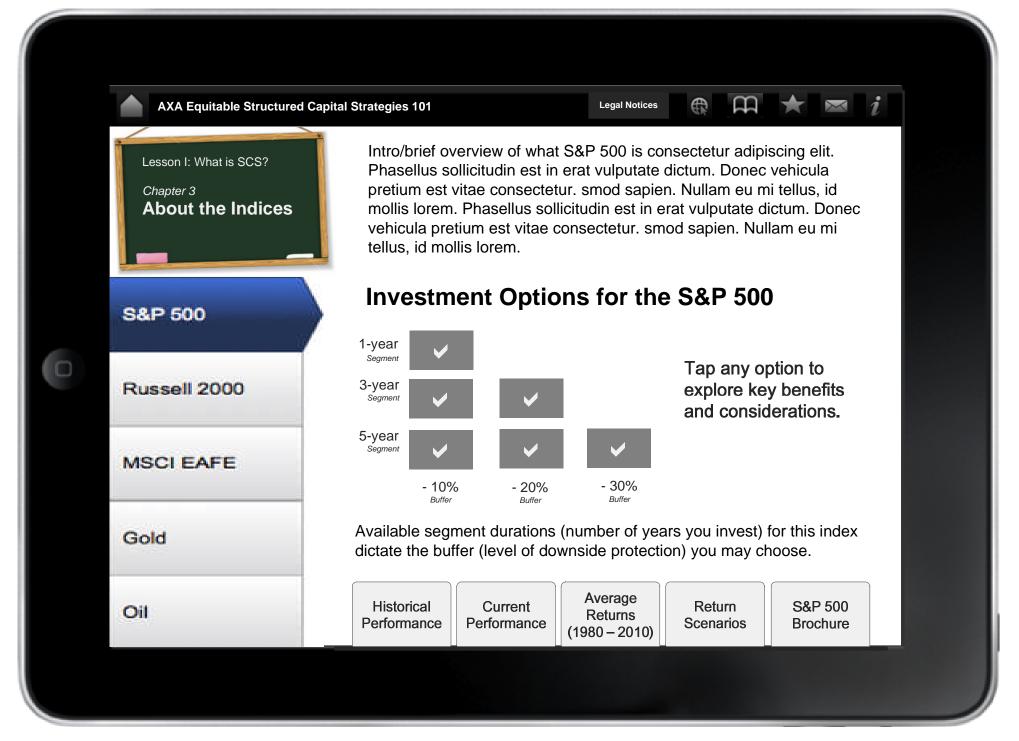
In this case, user has selected a new Chapter within Lesson I: What is SCS?.

Here the "Index Info + Analysis" control takes the user in the deep dive interactive area for "About the Indices".





About the Indices



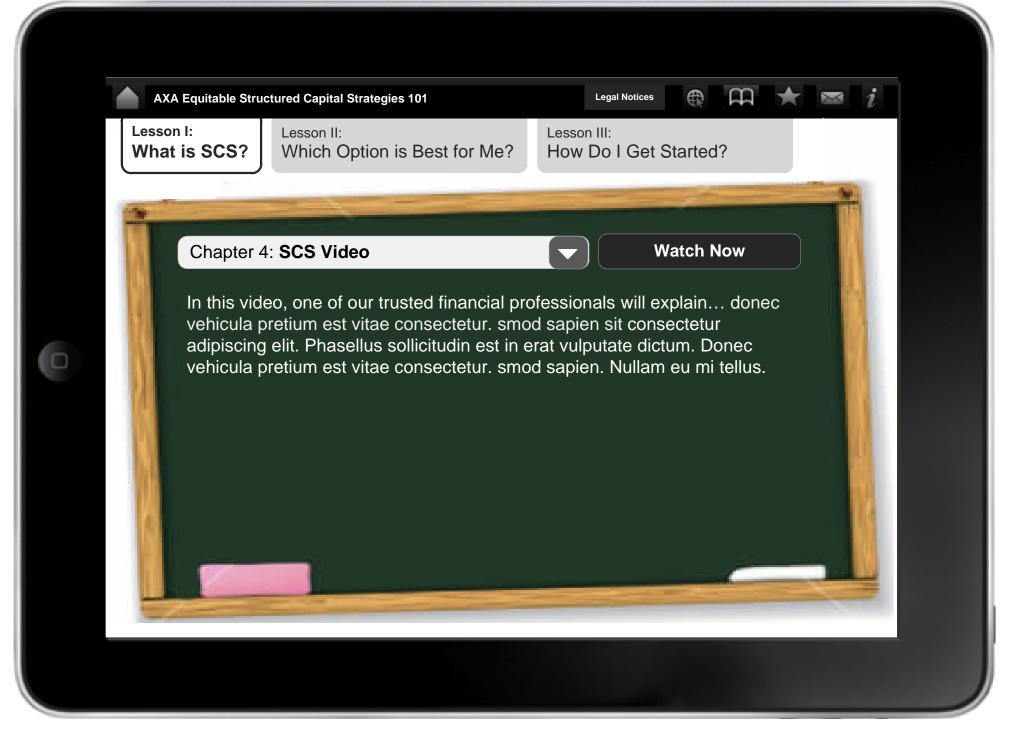
In this case, the user has selected "Index Info + Analysis" from the About the Indices lesson.

NOTE: Only shown here to illustrate how the functionality developed within the other concept can easily be appropriated into a different concept.





SCS Video

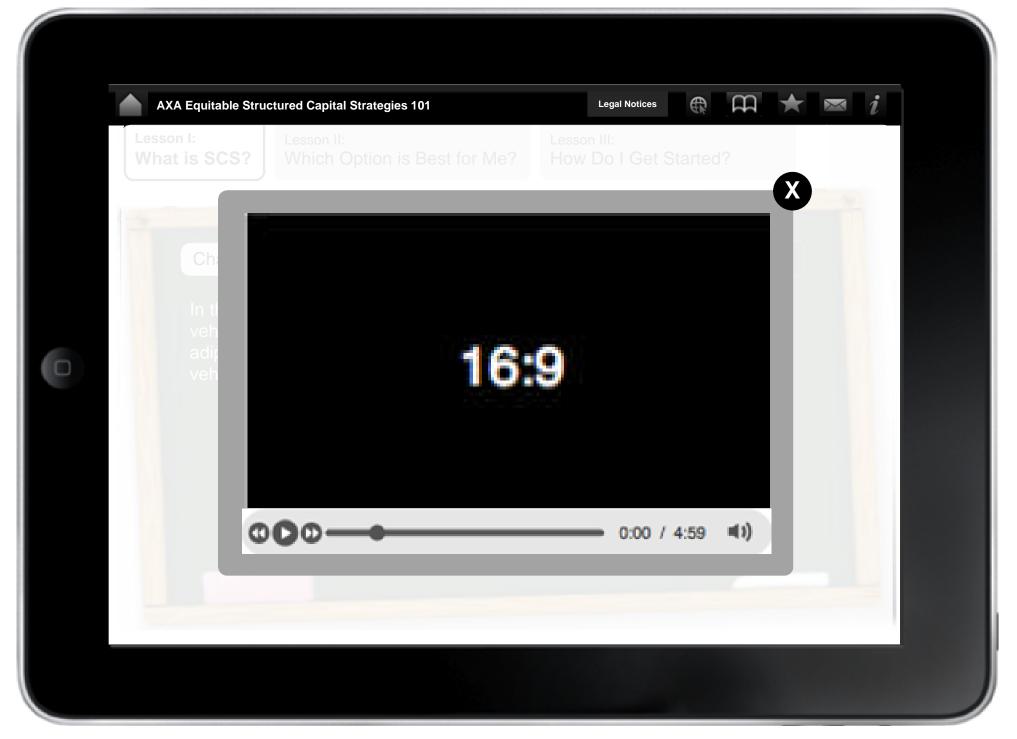


In this case, user has selected the "SCS Video" chapter within Lesson I: What is SCS?.





SCS Video



In this case, user has selected "watch Now" from the the "SCS Video" chapter within Lesson I: What is SCS?.





#### **APPENDIX**

Interactive Hypothetical Charts
Original Non-Concept Specific Layouts







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IF from "saved" option = saved selection for corresponding profile

User can change parameters (with each selection affecting other available options) and can "save" any option not already saved.

User can select hypothetical "Contribution" amounts to see how scenario would play out with a real investment—ultimately showing what that investment would turn in to (e.g. \$30,000, -\$10,000)

Default = Minimum contribution value







This area is essentially a window containing the "hypothetical chart" functionality - the "viewable" area of the chart depends on the current view (rolls to loss scenario when "Downside Protection" scenarios are selected, rolls to profit scenarios when "Upside Potential" scenarios are selected).





