

AXA Equitable

**SCS iPad App**



**gabardine**

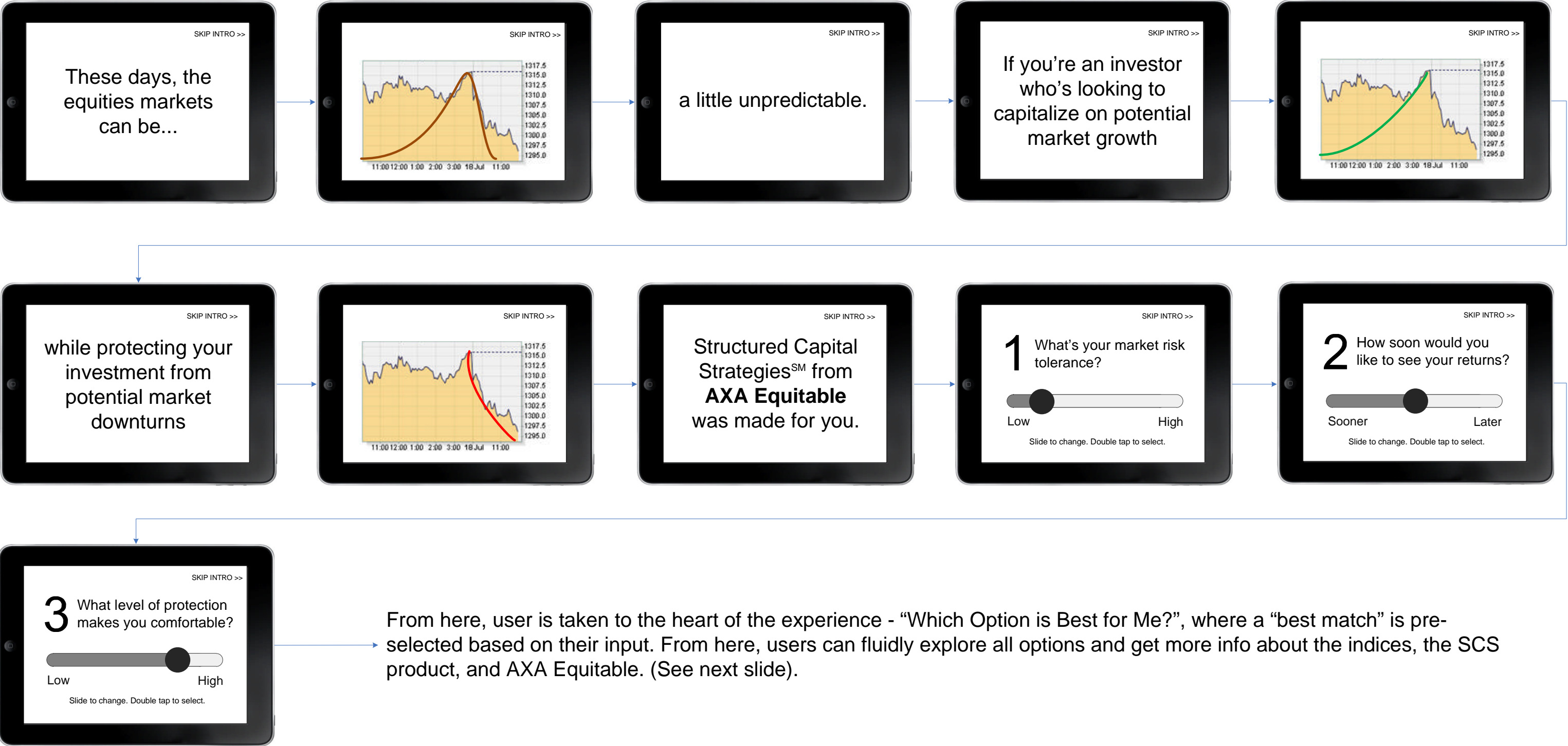
# Concept 1

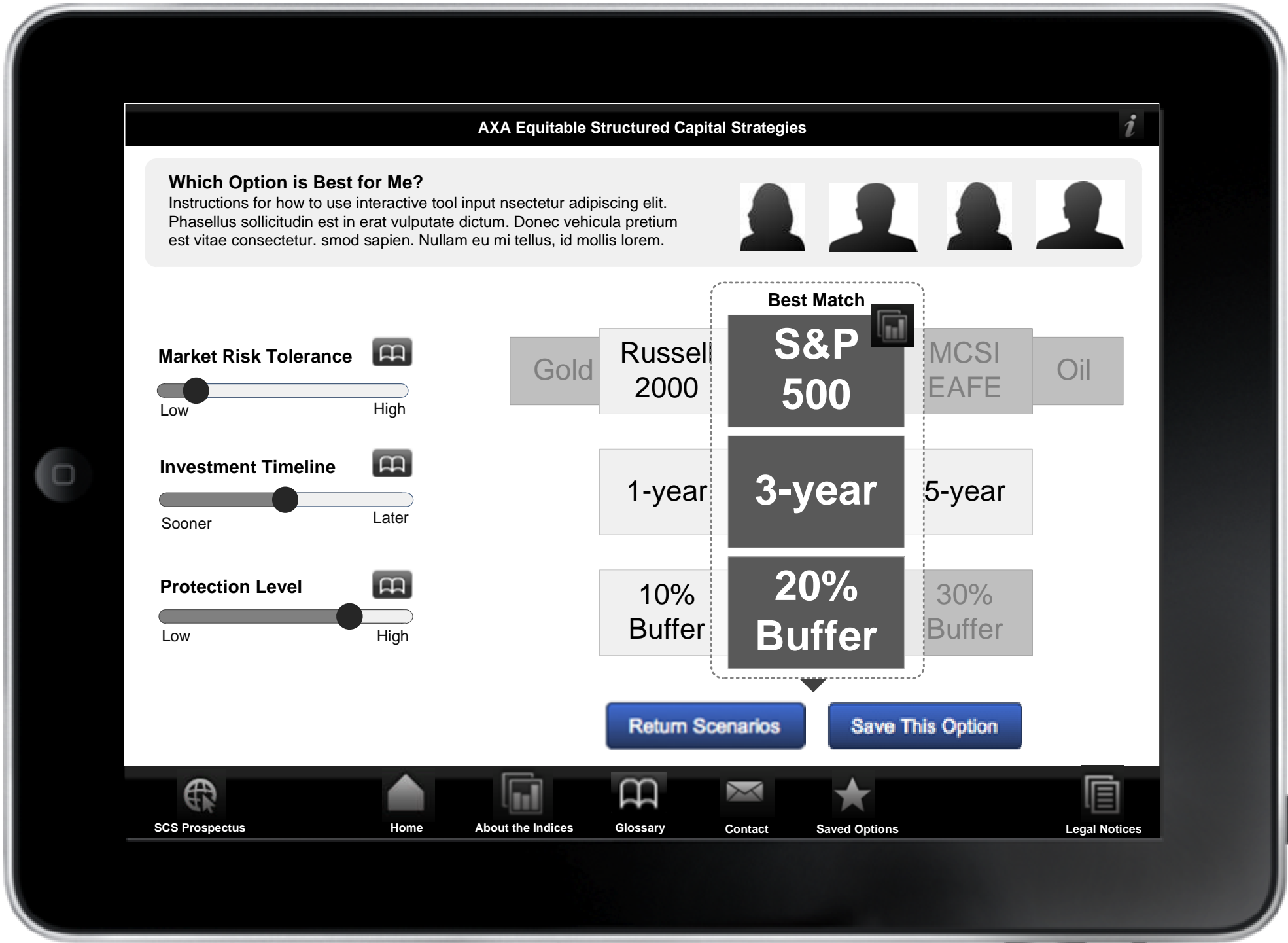
# SLIDERS

## *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.

Introduction approx. 45" - 60"



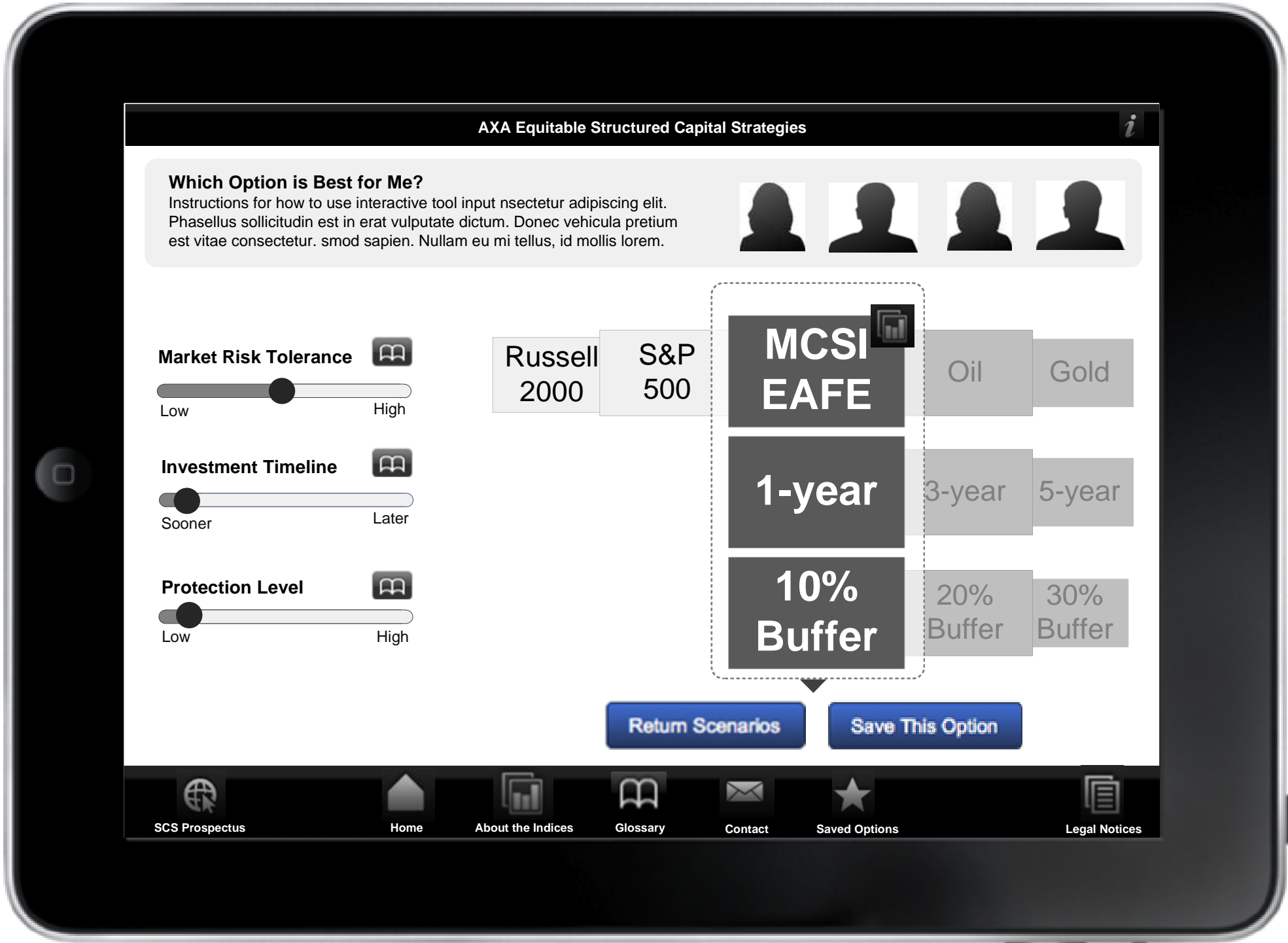


Selection is pre-populated based on “intro” inputs. If user were to “skip” intro and navigate here, option would be:

- 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).







Concept 2

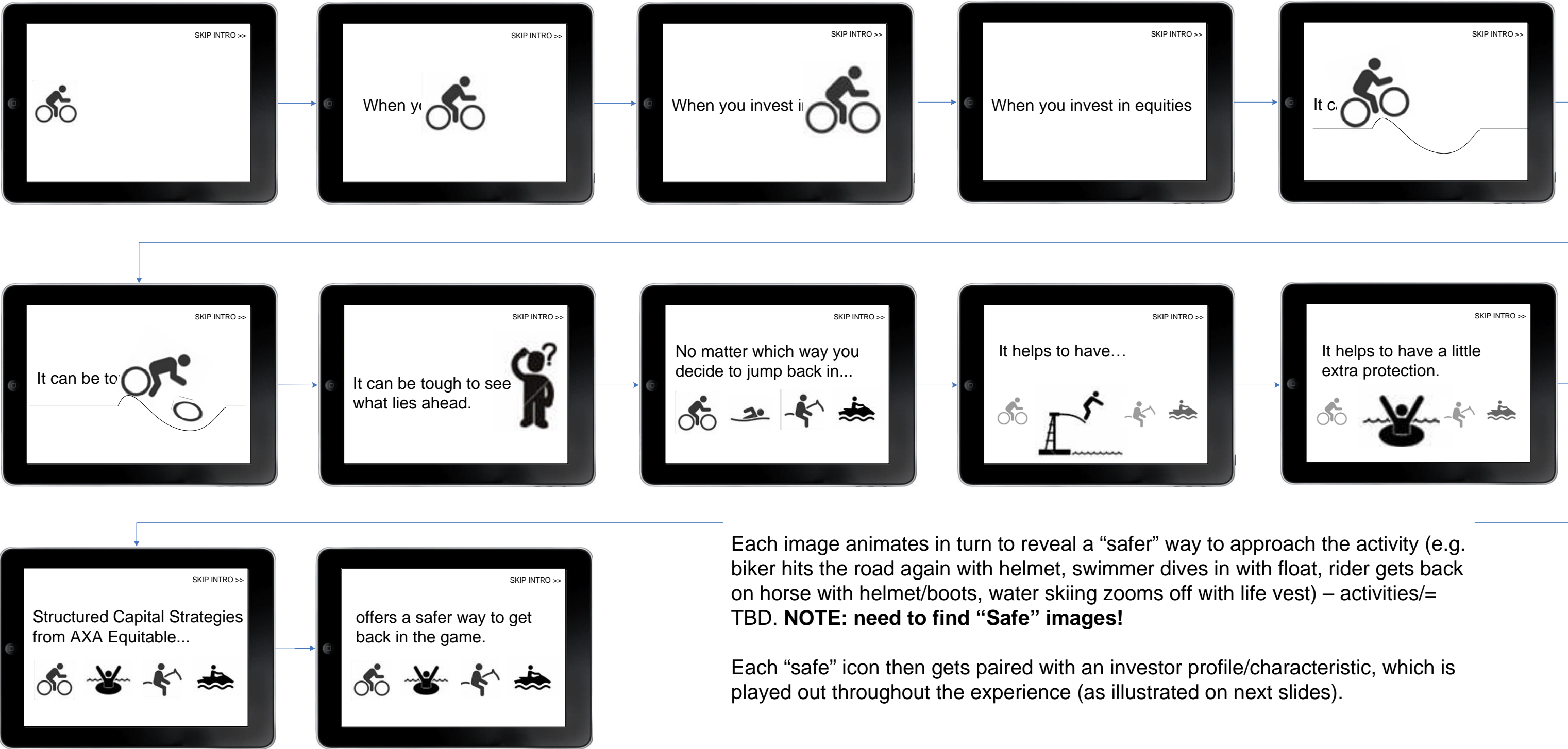
# JUMP BACK IN

*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.

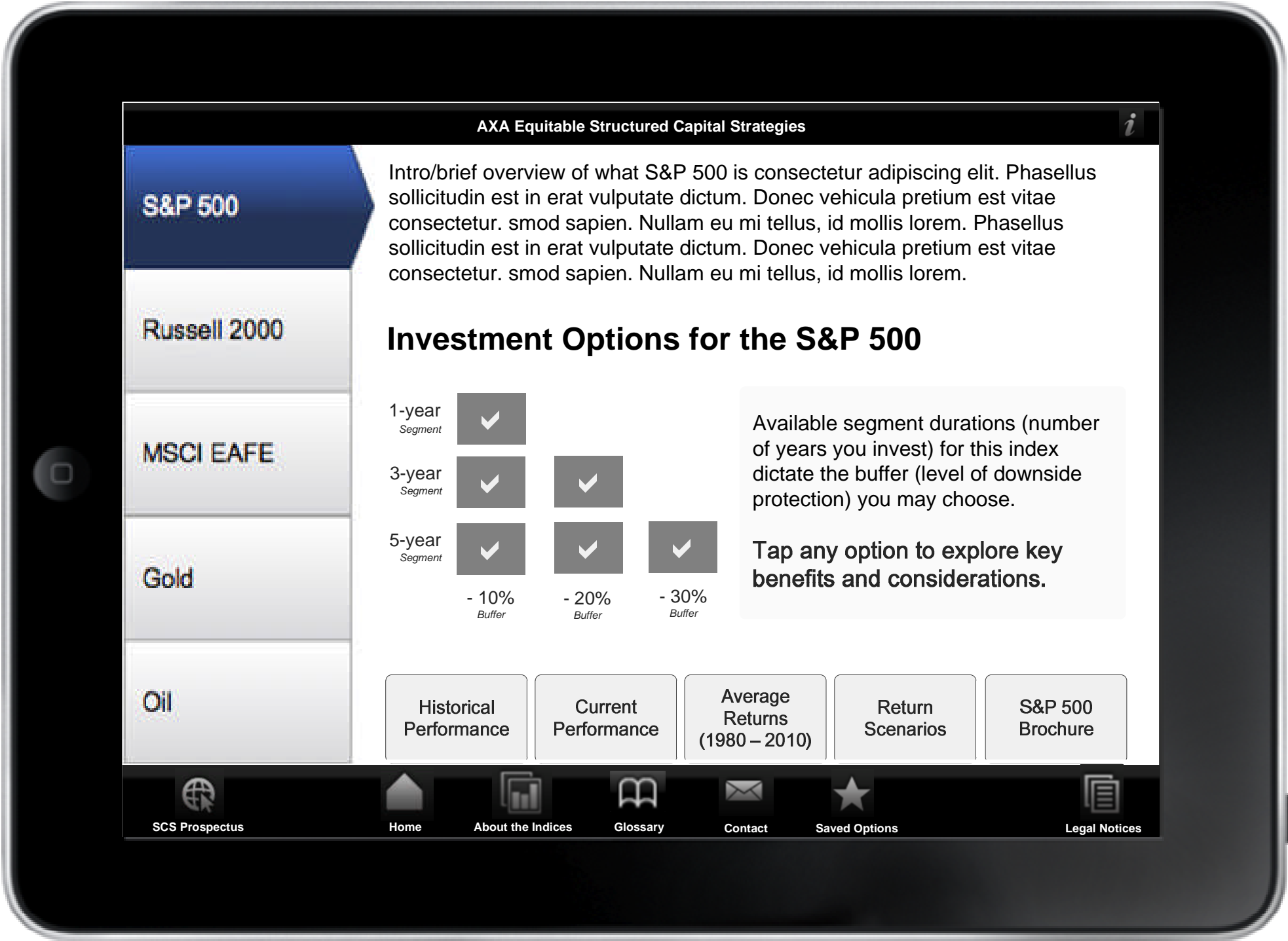


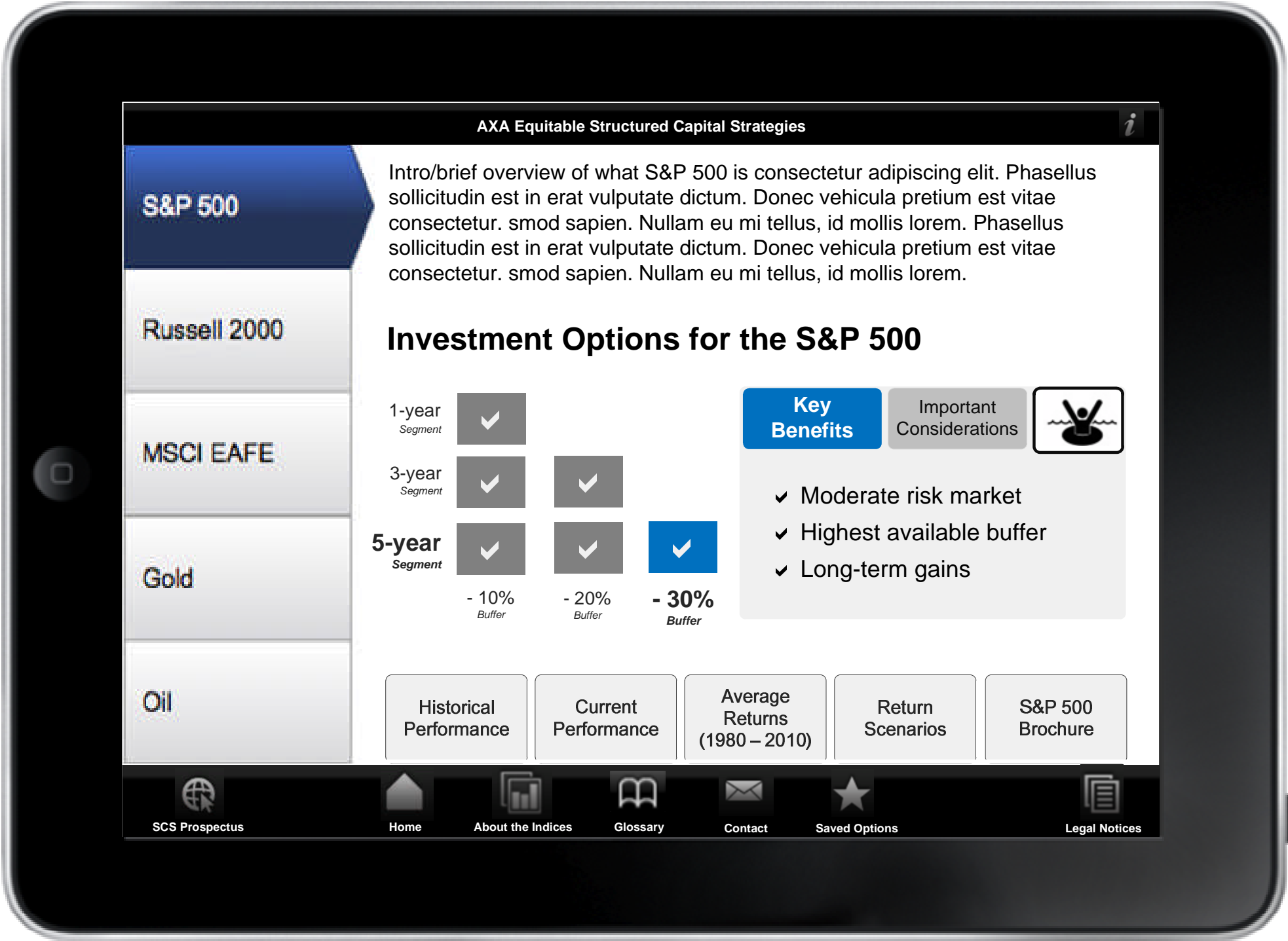
Introduction approx. 45" - 60"

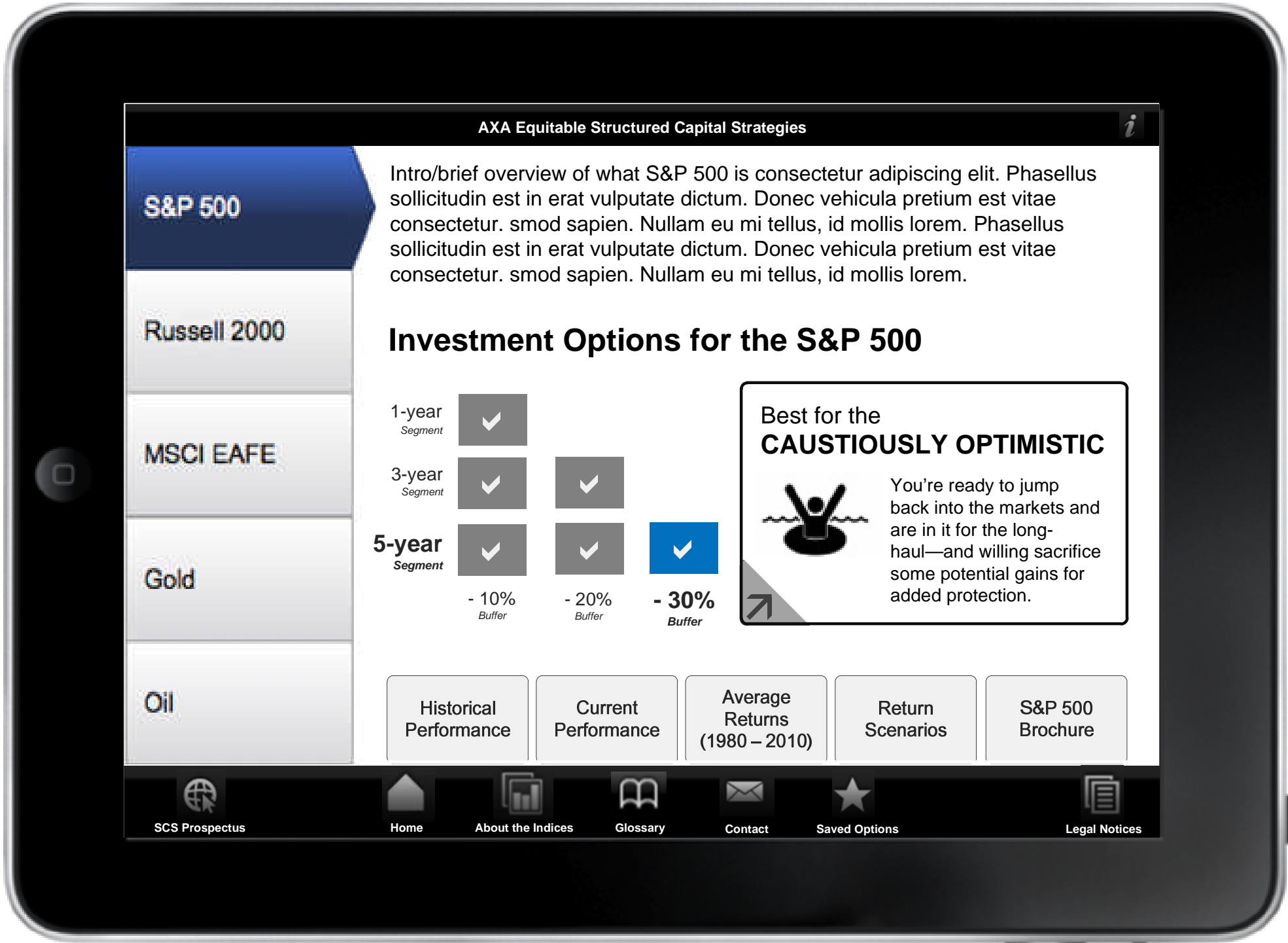


Each image animates in turn to reveal a “safer” way to approach the activity (e.g. biker hits the road again with helmet, swimmer dives in with float, rider gets back on horse with helmet/boots, water skiing zooms off with life vest) – activities/= TBD. **NOTE: need to find “Safe” images!**

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







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

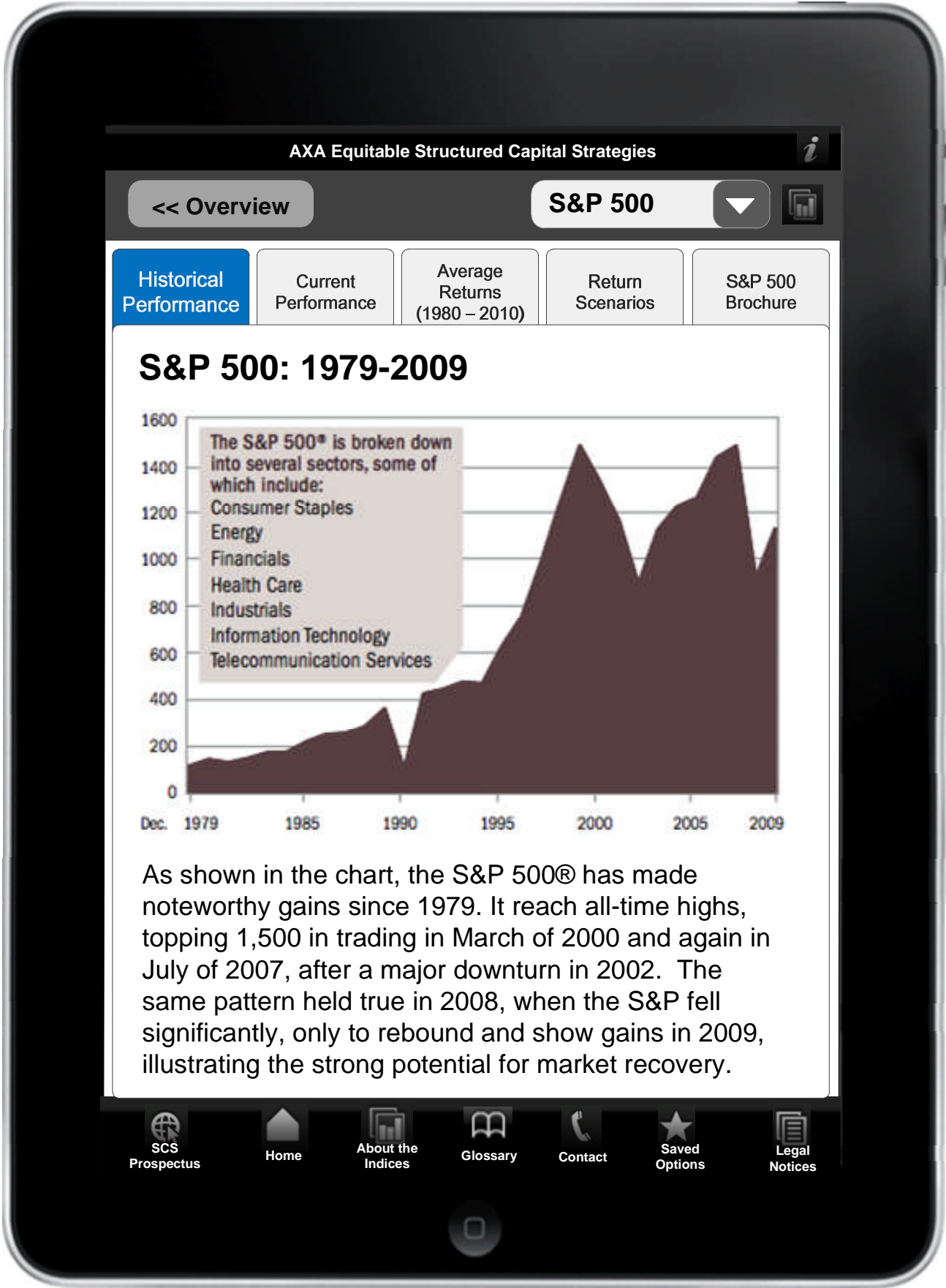
SWIMMER = David  
 WATERSKIIER = Tom  
 HORSEBACK RIDER = Susan  
 BIKER = Gary

Matches to options + copy TBD.









## Concept 3

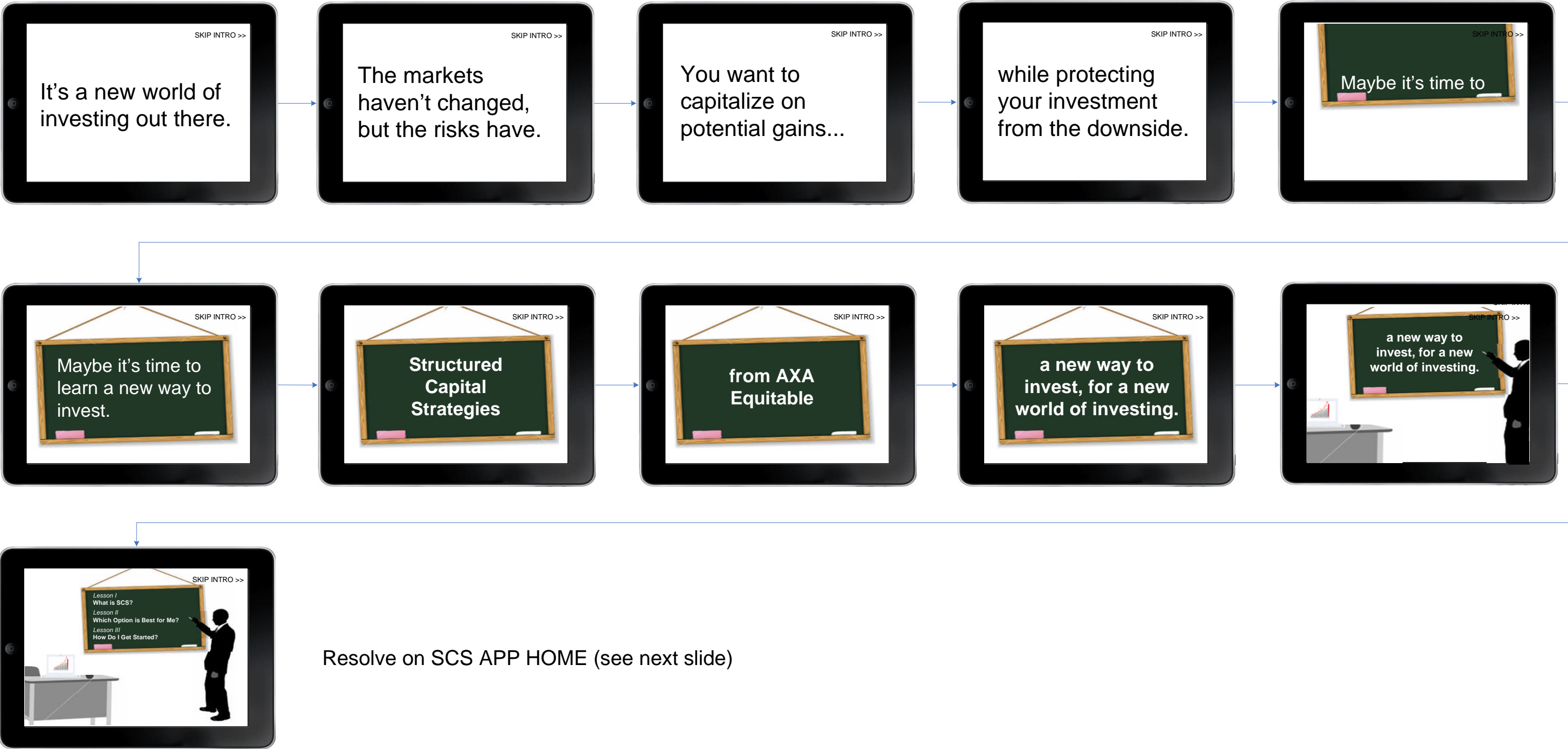
# SCS 101

### *EDUCATIONAL Approach*

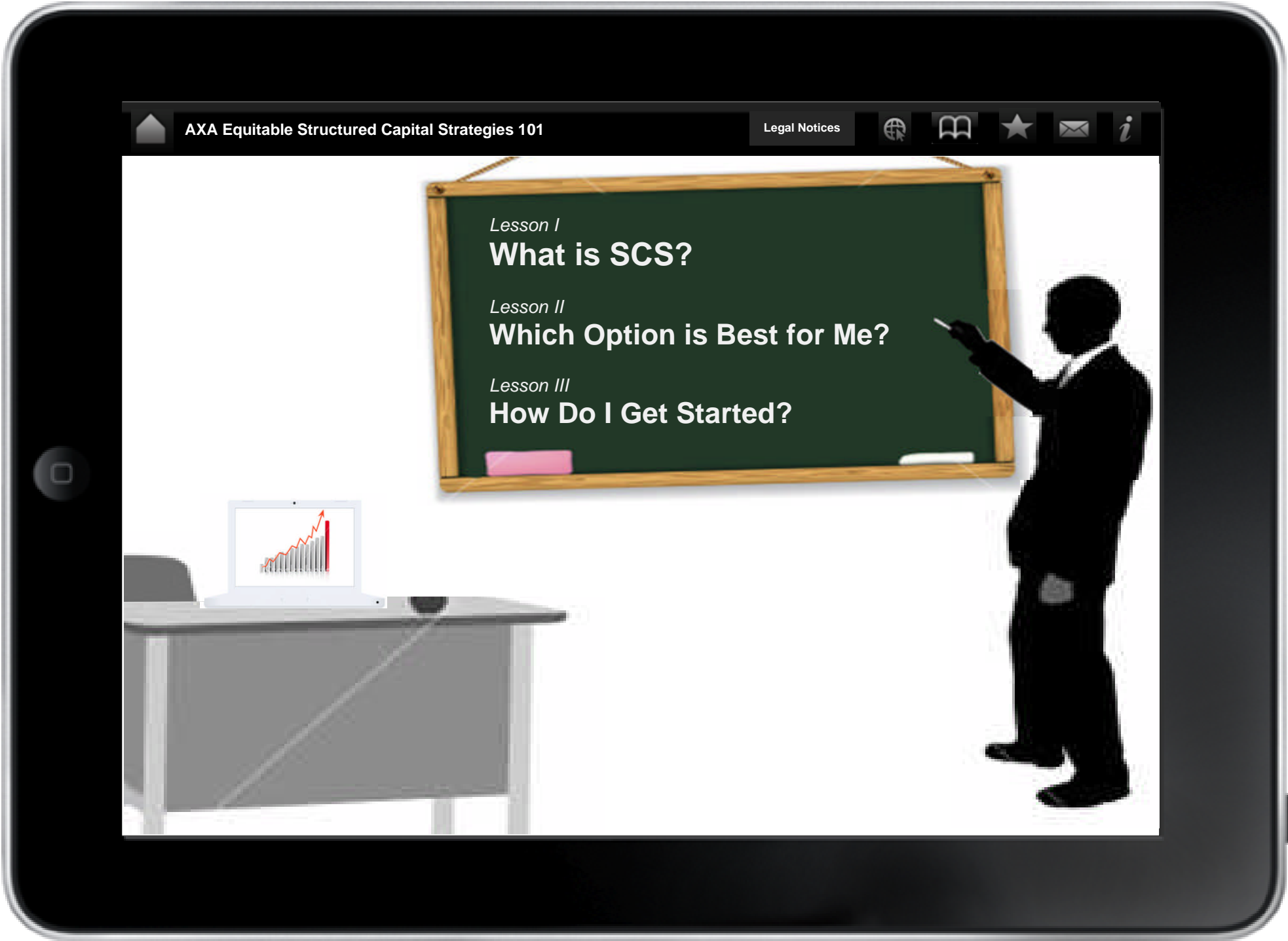
Users are encouraged to “learn a new way of investing”—taking the “SCS 101” course to see how Structured Capital Strategies offers smart, new options (with greater protection) for a new world of equities investing (with greater risk).



Introduction approx. 45" - 60"



Resolve on SCS APP HOME (see next slide)



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

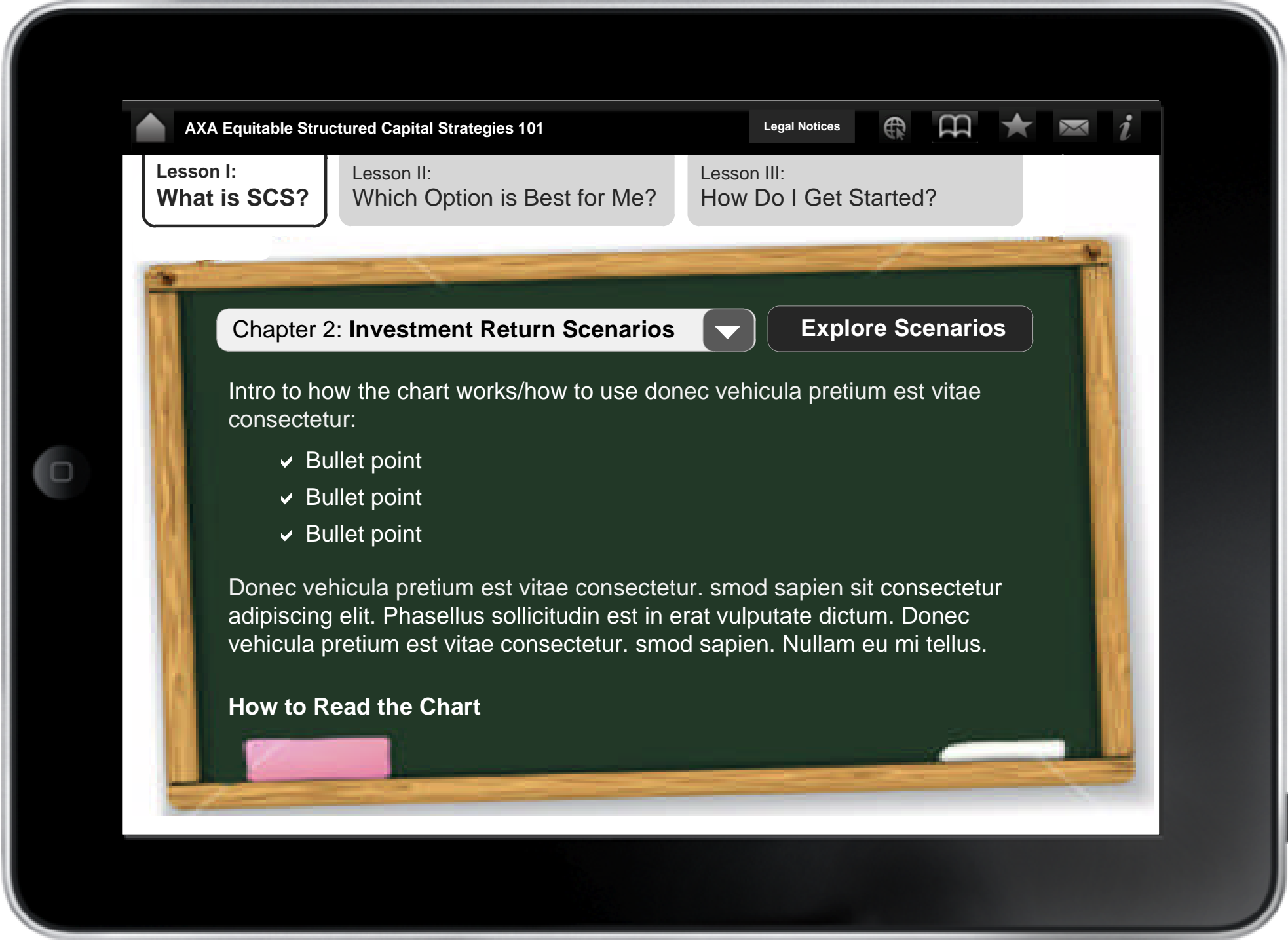
TBD Image/Element  
Which Option is Best for Me

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.

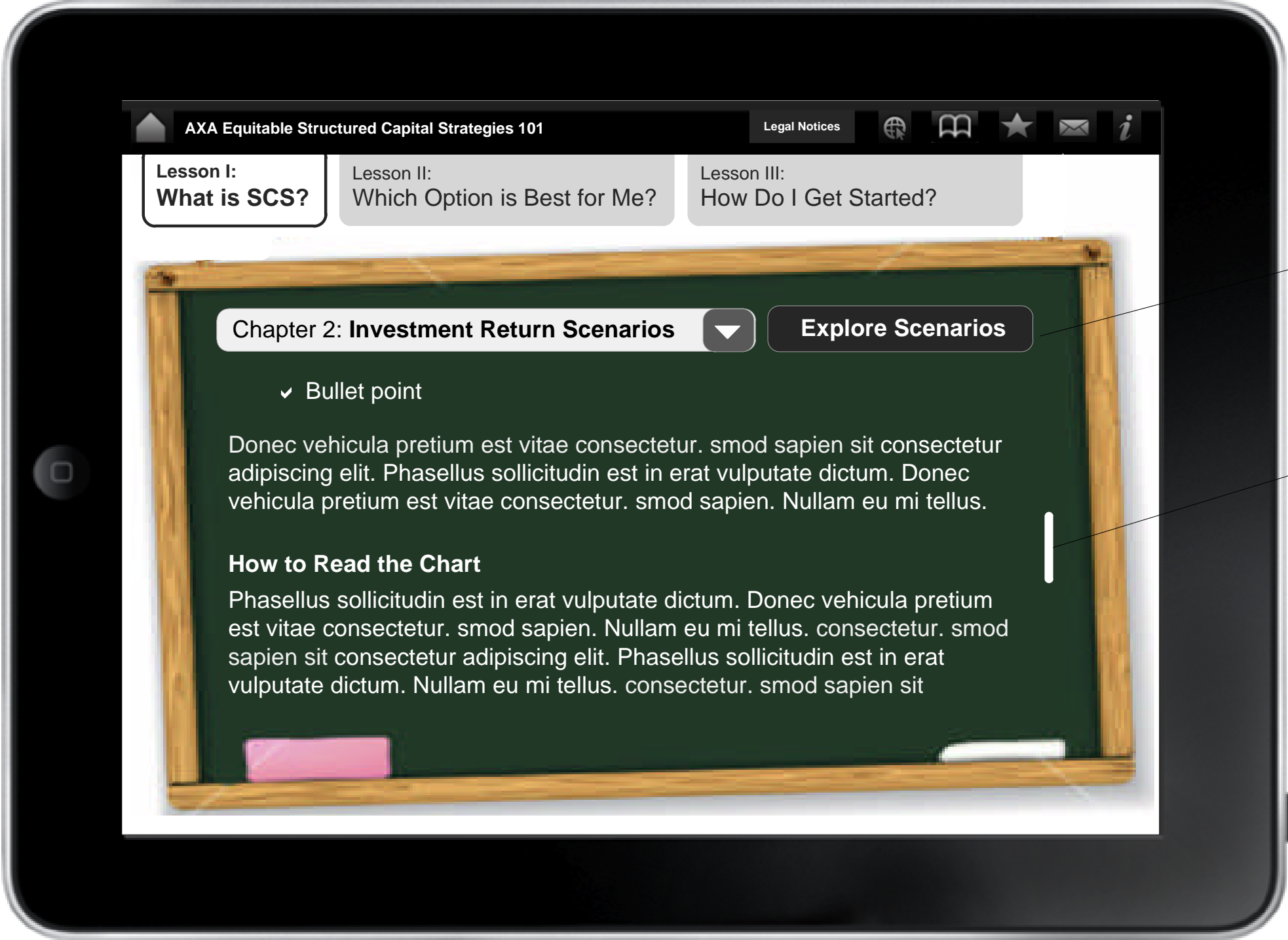


From the intro, the user can navigate through the “lessons” or jump right into one of the key interactive/transactional areas.

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

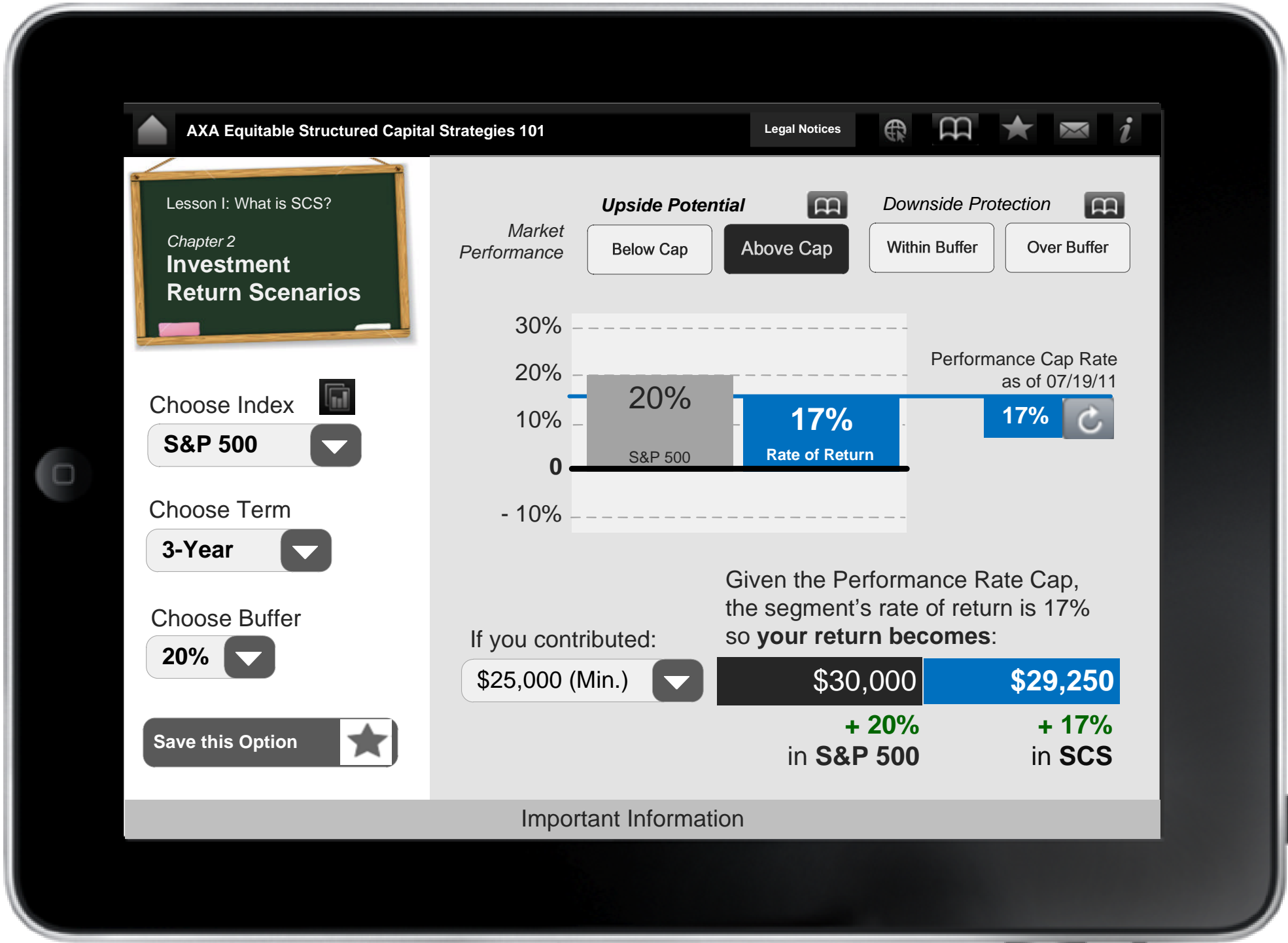
“Chapters” within each lesson correspond to the subsections (2.1, 3.1, 4.1, etc.), which can be accessed using the pulldown control.

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



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 Hypothetical Chart (aka “Investment Return Scenarios”) lesson.

Selections are pre-populated as follows:

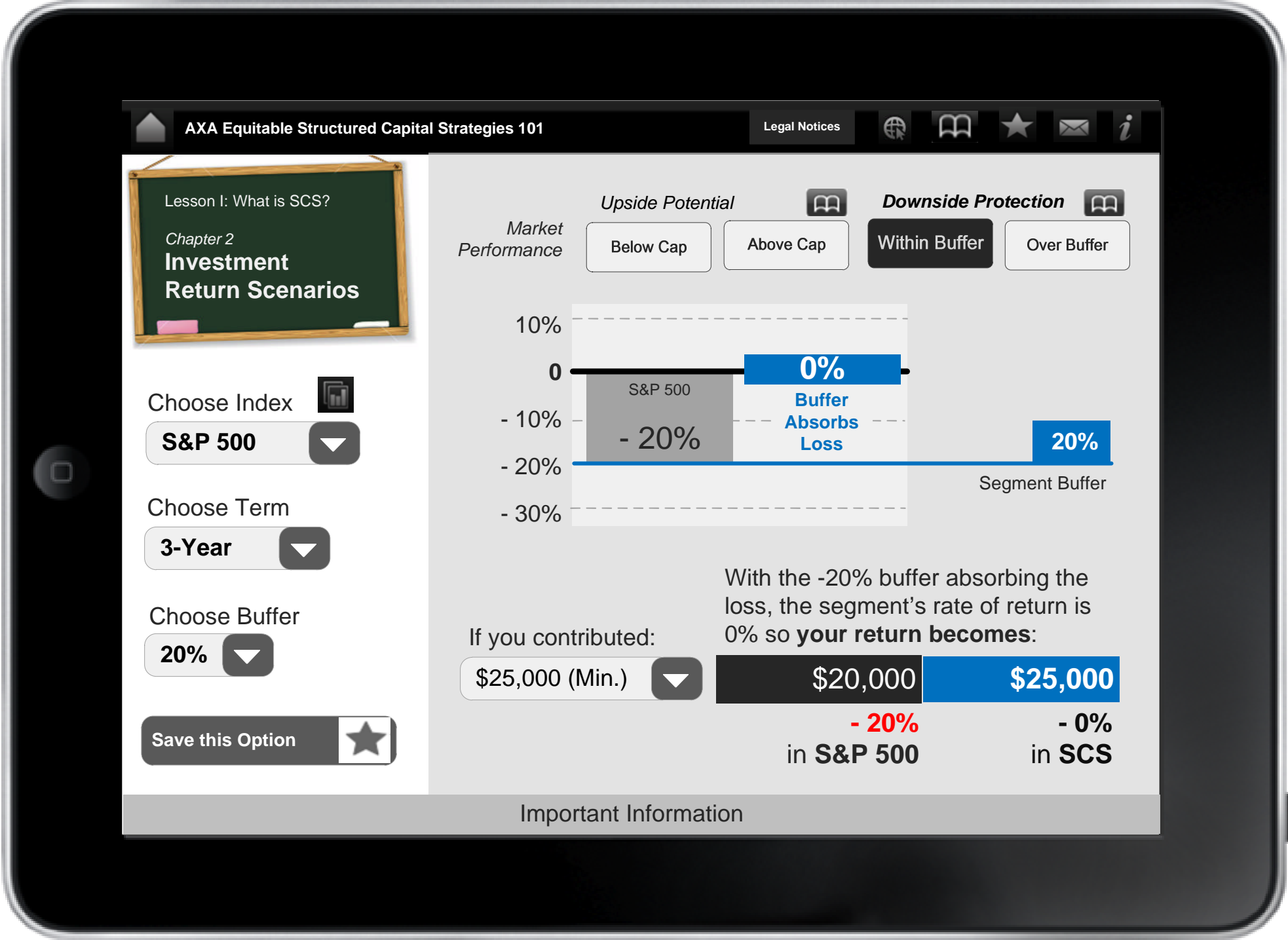
- IF first use = TBD default selection/option
- IF repeat visit / coming from “Which Option is Best For Me?” = last corresponding selections
- IF from “saved” option = saved selection for corresponding profile

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)

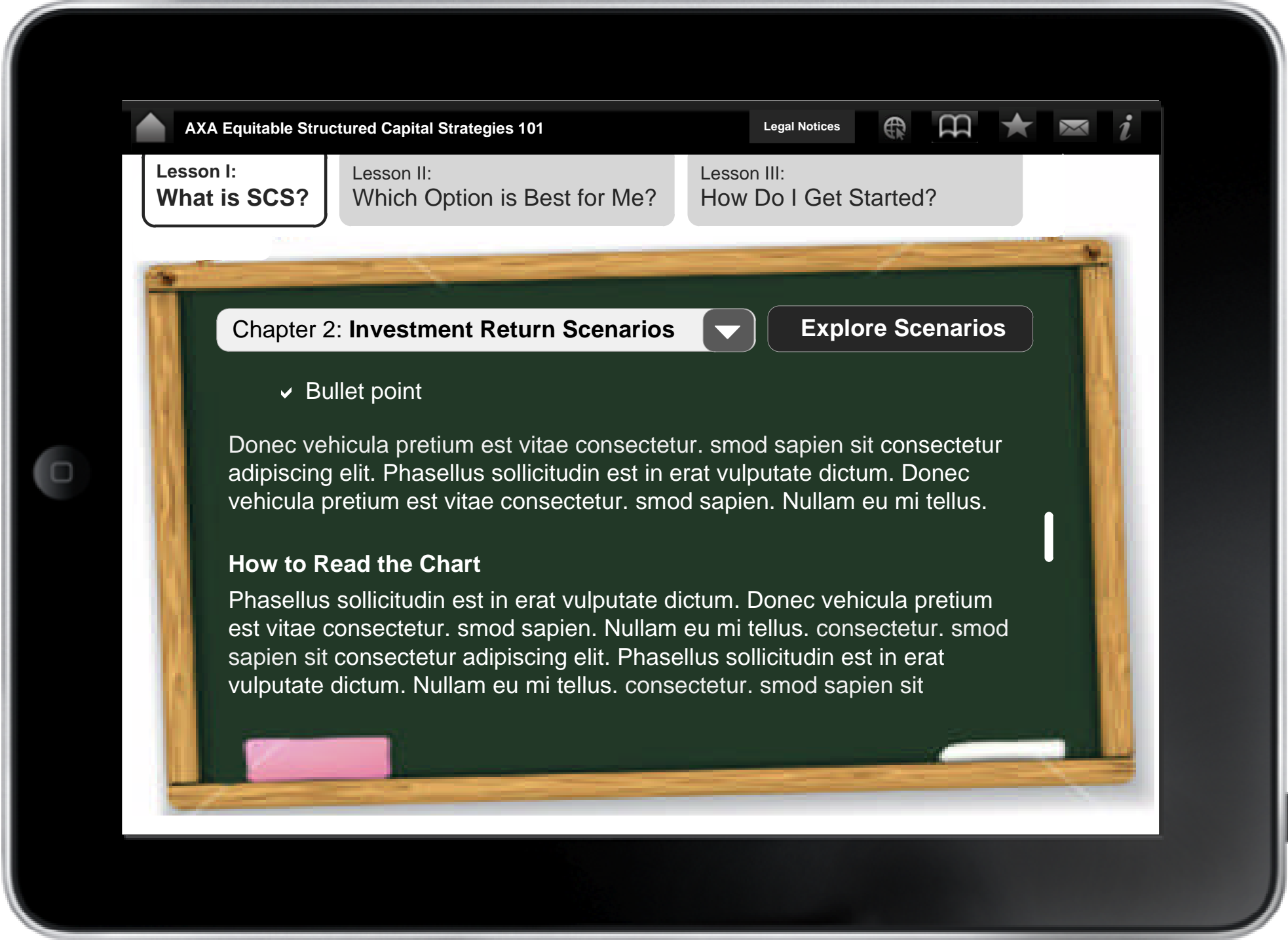
Default = TBD (Minimum contribution value shown here)



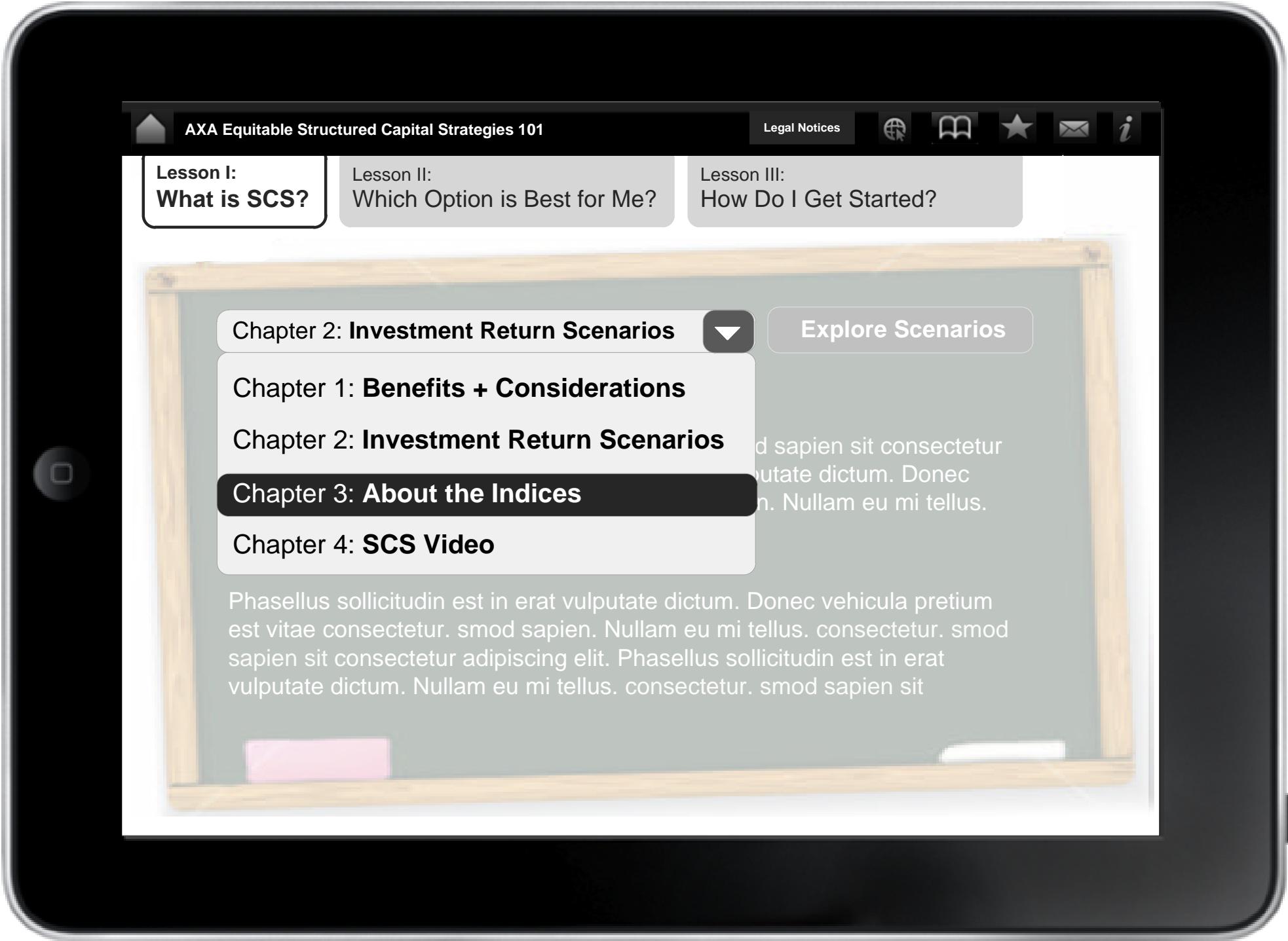


This area is essentially a window containing the “hypothetical chart” functionality – the “viewable” area of the chart depends on the current view (rolls to loss scenario when “Downside Protection” scenarios are selected, rolls to profit scenarios when “Upside Potential” scenarios are selected).

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.



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

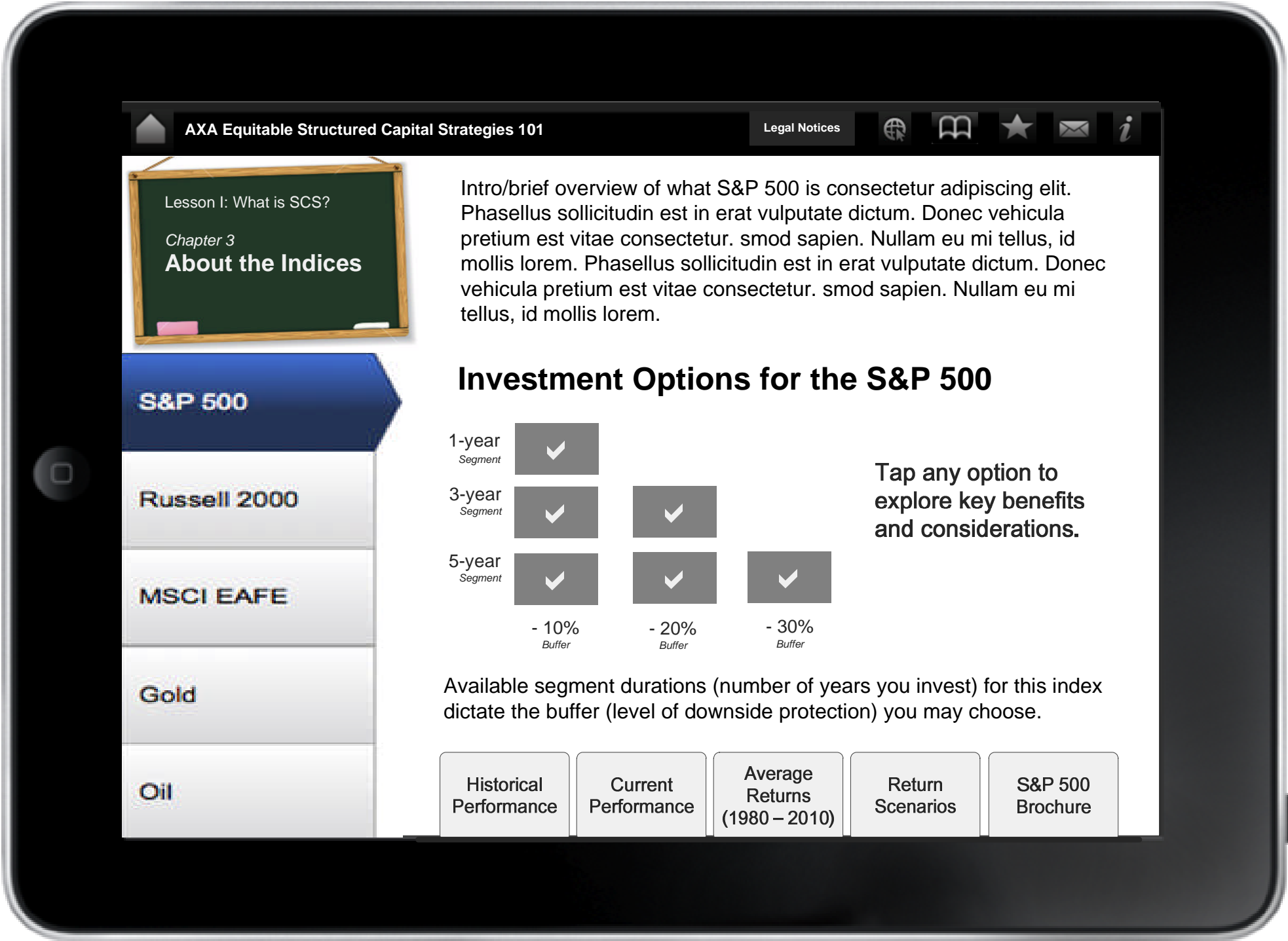
The user can use the pulldown control to navigate to the various “chapters” in a given “lesson”.





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”.

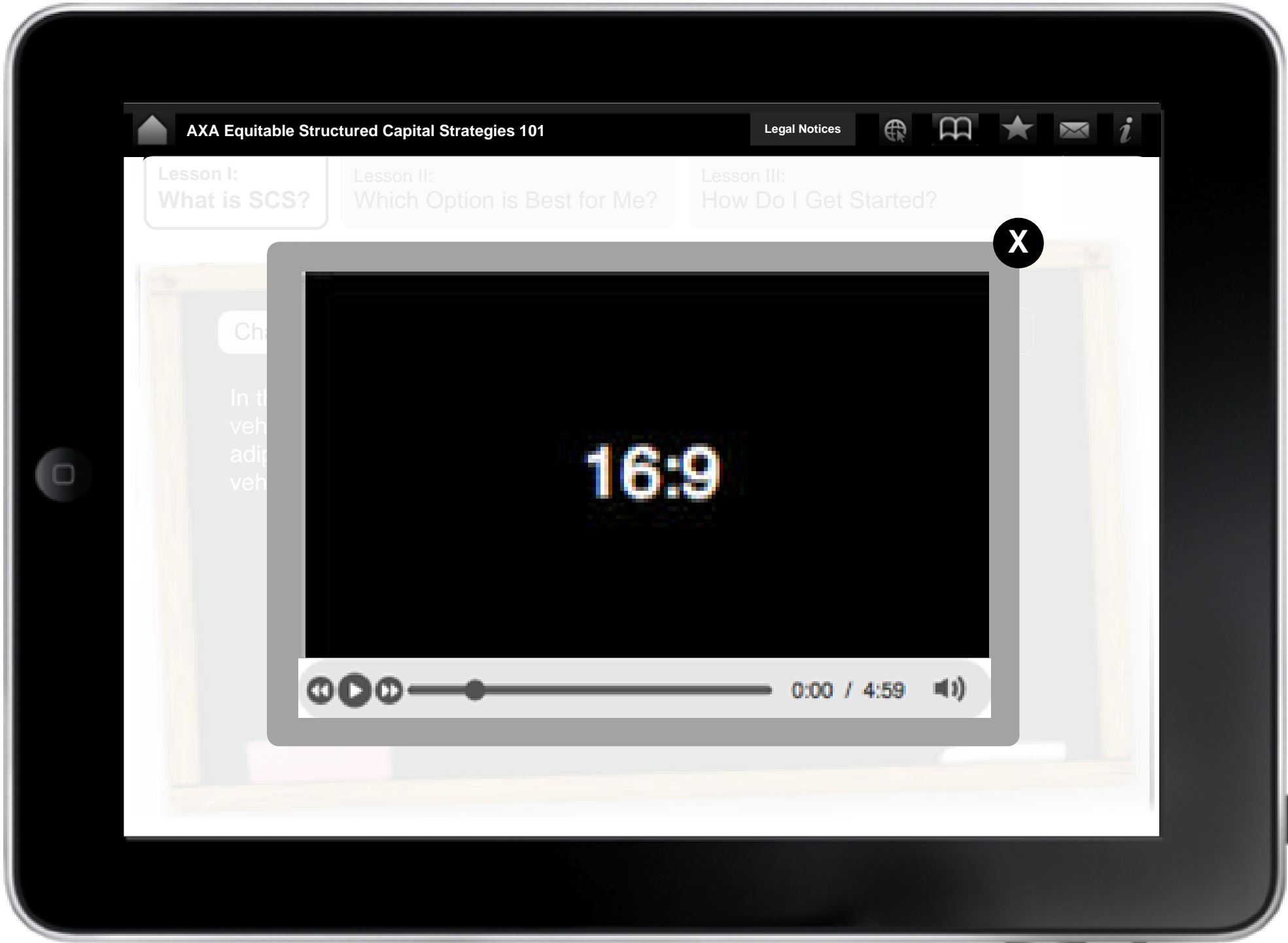


In this case, the user has selected “Index Info + Analysis” from the About the Indices lesson.

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



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



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*



Selections are pre-populated as follows:

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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).

END