WEBSITES
That Work

tiny frog
TECHNOLOGIES

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Project Manager

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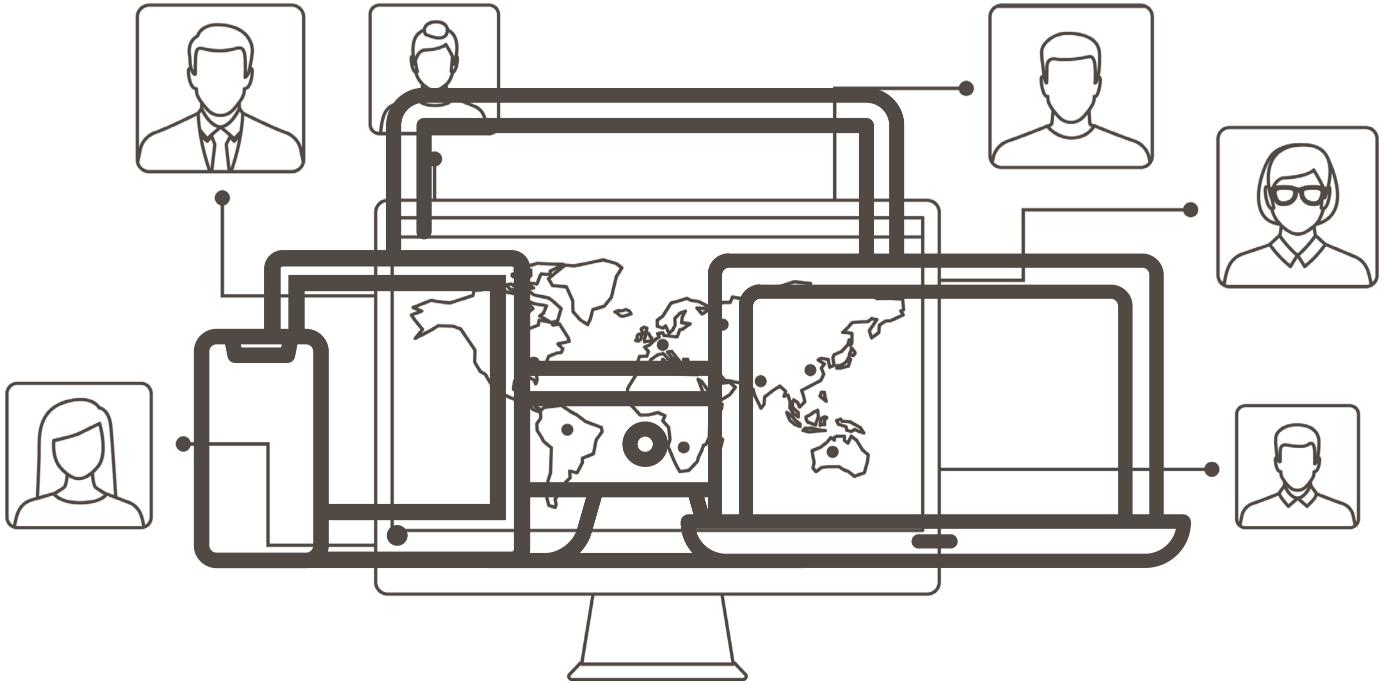
TECHNOLOGIES

LIMITLESS

The Digital Transformation

Your Website & User Experience (UX)



User Experience (UX)

Understanding Your Web Visitors

76%

76% of customers

expect companies to

understand

their needs & expectations

Source: Salesforce Research 2018

VISITOR PROFILE 1

Getting ready to retire

WHAT ARE THE EVENTS LEADING UP TO THE VISIT?	WHAT ARE THEIR GOALS?
- Referral from an existing client - Recognition that they are getting ready to enter the next stage in life and they need a plan for that stage	- Get organized and make a plan - Find a firm to help them stay on the path throughout this next phase of their lives so they
WHAT ARE THEIR PAIN POINTS?	**W**
- Overwhelmed: Now what sort of feeling - Lack of understanding: Basic individual doesn't know how to properly live and balance this next stage of life - Fear: Will they be able to financially handle everything?	

VISITOR PROFILE 2

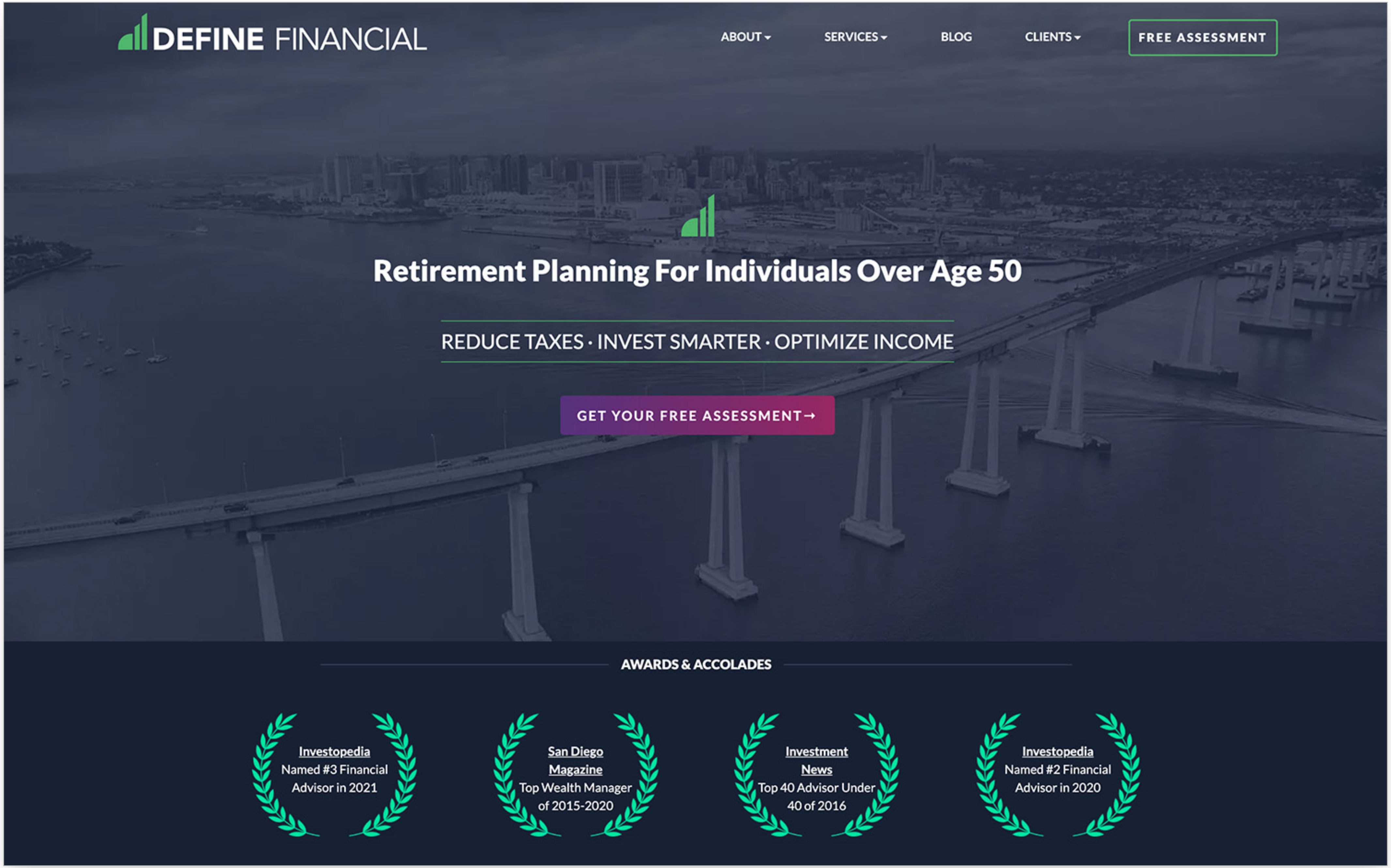
In Transition

WHAT ARE THE EVENTS LEADING UP TO THE VISIT?	WHAT ARE THEIR GOALS?
- Referral from an existing client - Recent life event and now have money (relative passed away, divorced)	- Find a firm they can trust who can help them with their recent life event - Someone who understands their situation
WHAT ARE THEIR PAIN POINTS?	**WHAT ARE THEIR KEY QUESTIONS?**
- Fear of the unknown: Transitioned into having some money and don't know what to do next - Confused: So many options.. Which one is right? - Scared: Will I make the right decision? Who do I trust?	- What makes our company different than other planners? - Can I trust this company? - What is the difference between investments and financial planning?

Build Trust & Credibility

- Industry Awards & Affiliations
- Social Trust (Case Studies, Clients Served)
- Visual Trust

Longevity


DEFINE FINANCIAL
ABOUT
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BLOG
CLIENTS
FREE ASSESSMENT
Retirement Planning For Individuals Over Age 50
REDUCE TAXES · INVEST SMARTER · OPTIMIZE INCOME
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Named #3 Financial Advisor in 2021
San Diego Magazine
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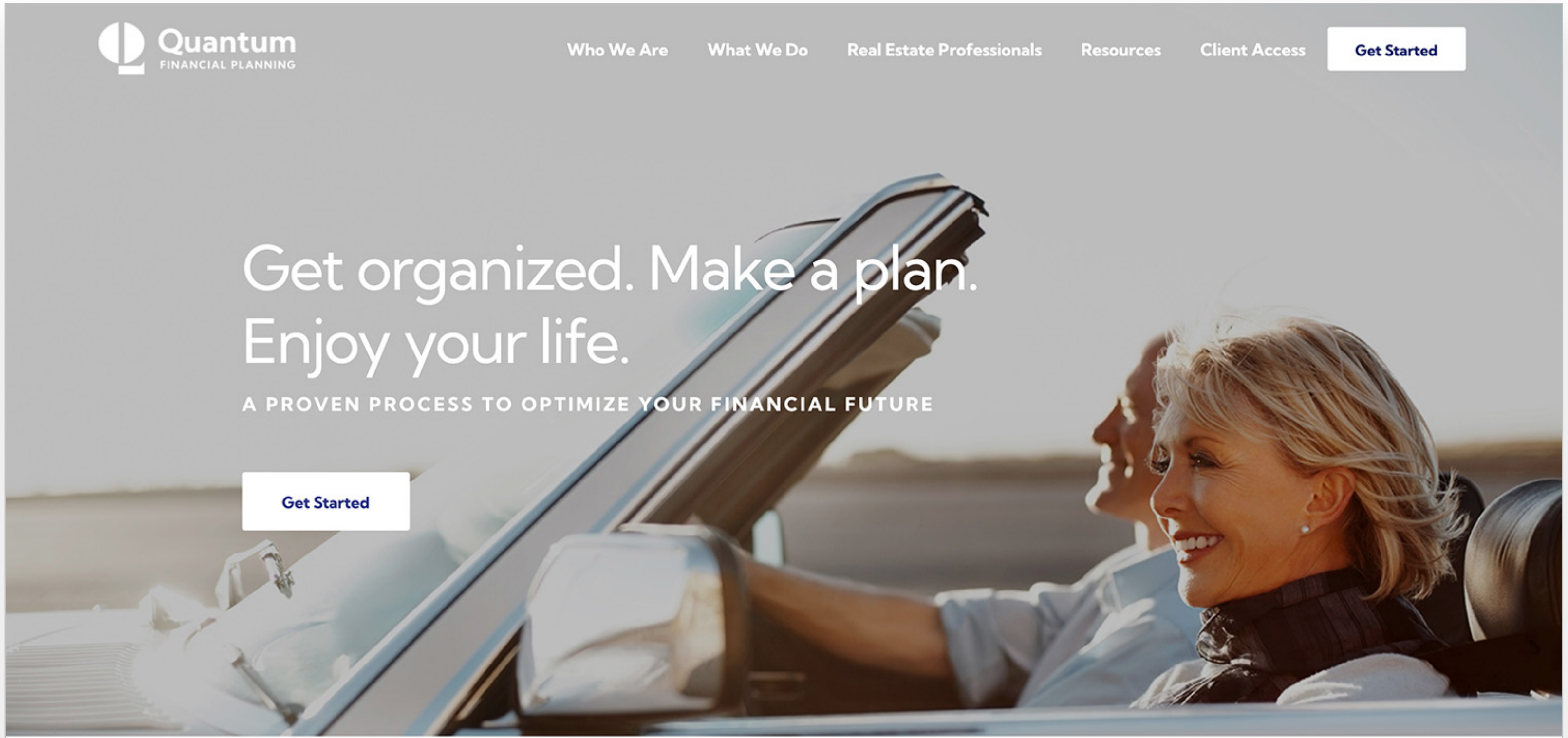


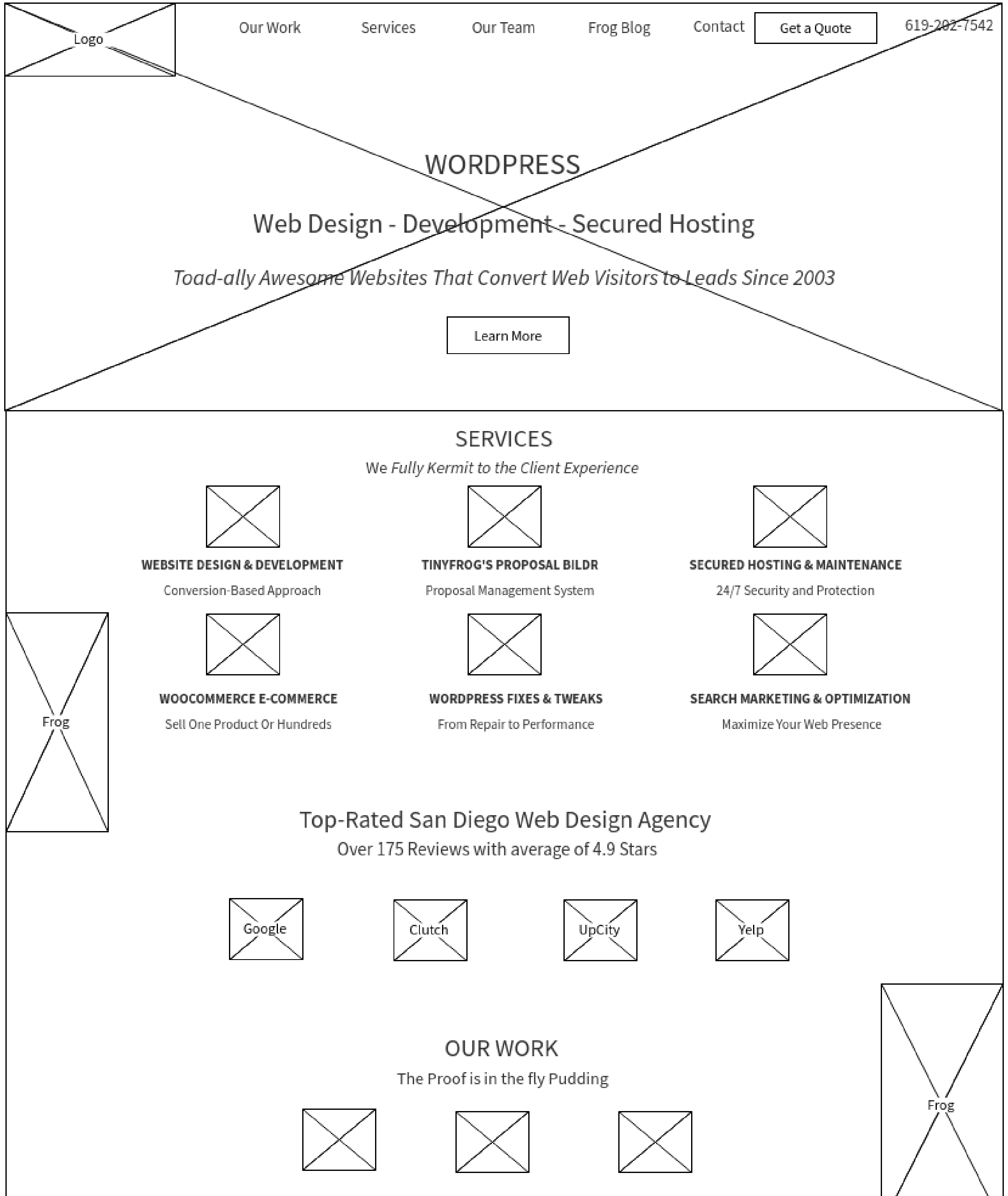
Your trusted financial advisor for comprehensive planning

Serving you face-to-face in Spokane, WA or virtually across the United States

It's one thing to have a written plan identifying the steps to reach your goals. It's quite another to follow through. At Quantum, we believe reaching your goals will require making adjustments as the plan unfolds. That's how and why we've seen success for our clients time and time again.

Serving clients since	Assets Under Management*	Average Client Tenure*
1979	$386,509,335	12.82 years

*All stats are as of 9/30/2020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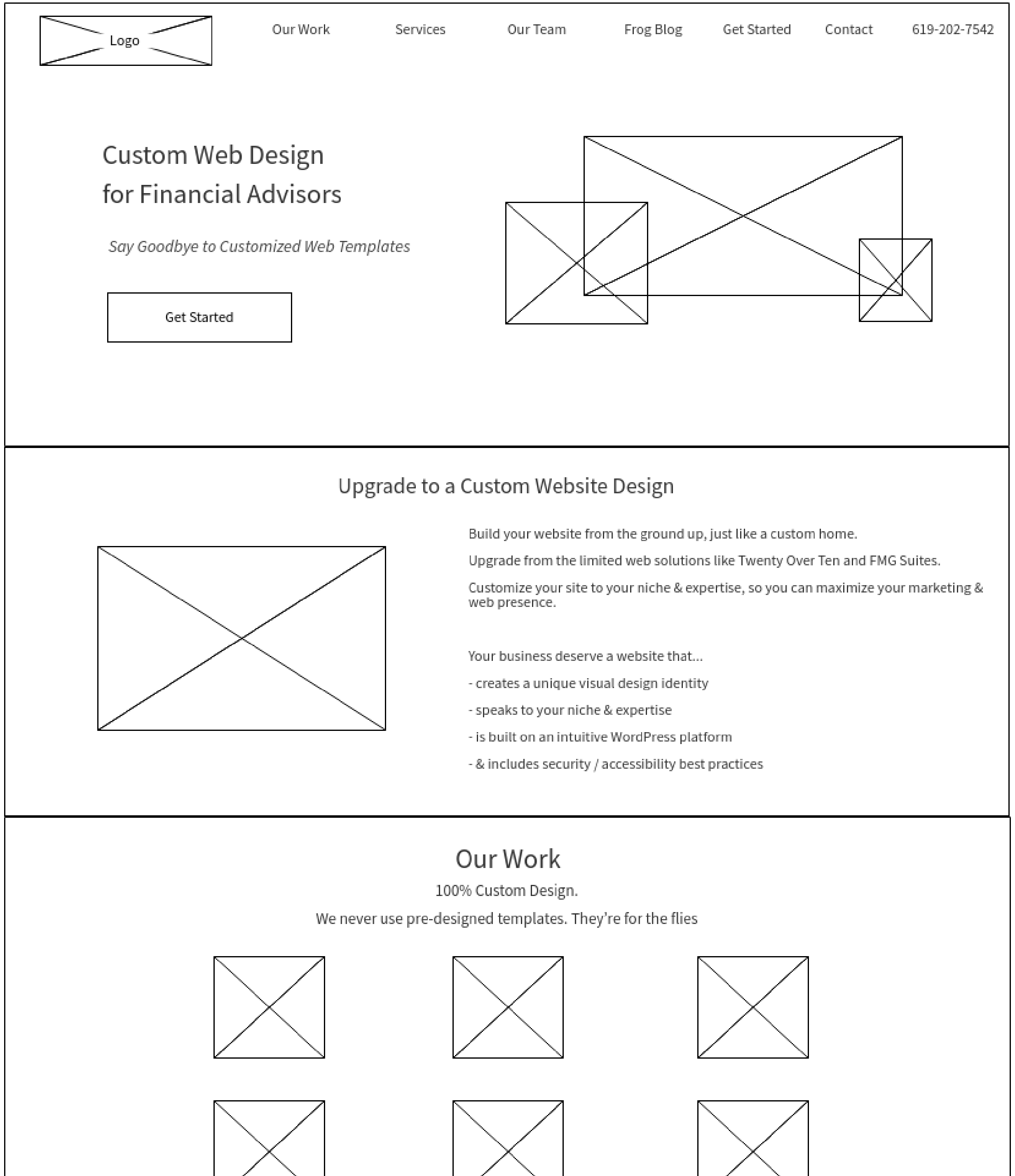
From Repair to Performance
SEARCH MARKETING & OPTIMIZATION
Maximize Your Web Presence
Top-Rated San Diego Web Design Agency
Over 175 Reviews with average of 4.9 Stars
Google
Clutch
UpCity
Yelp
OUR WORK
The Proof is in the fly Pudding
Frog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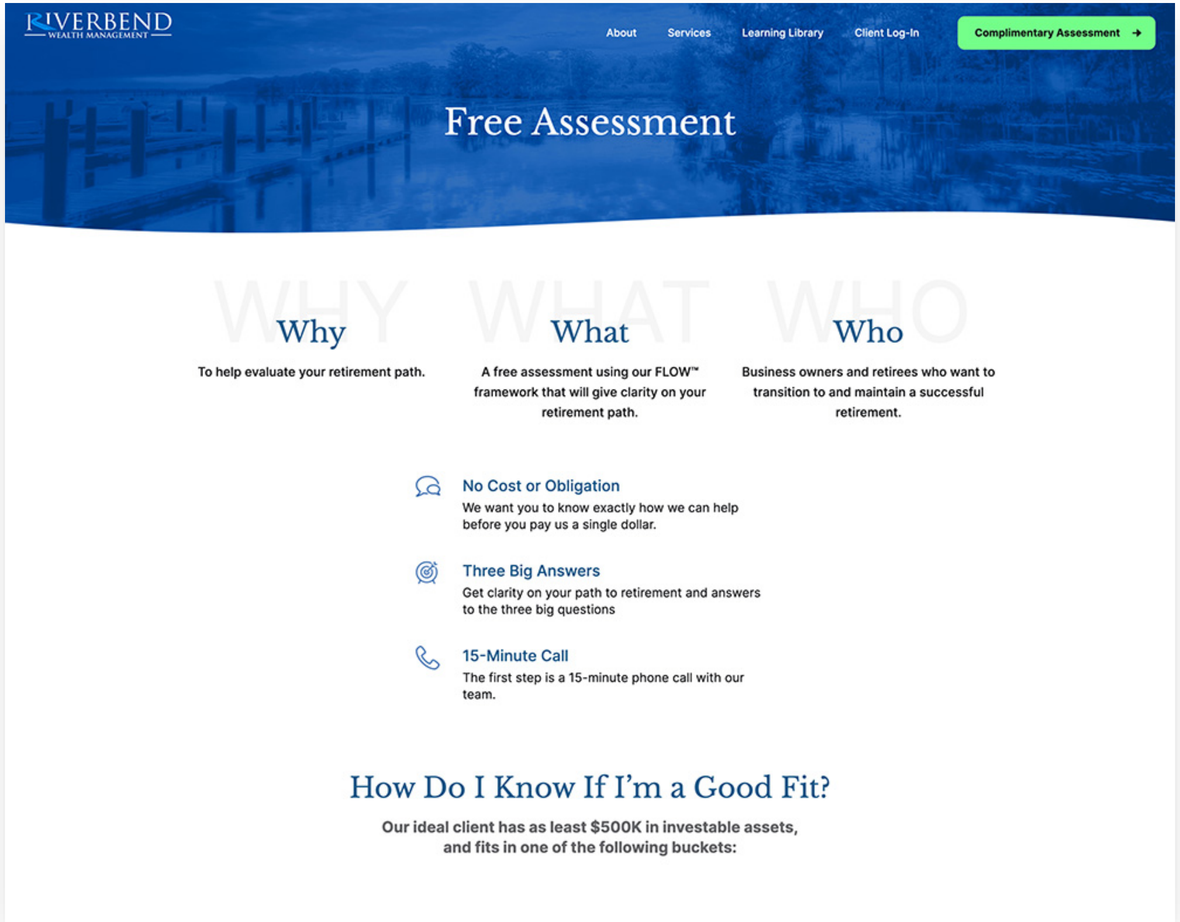
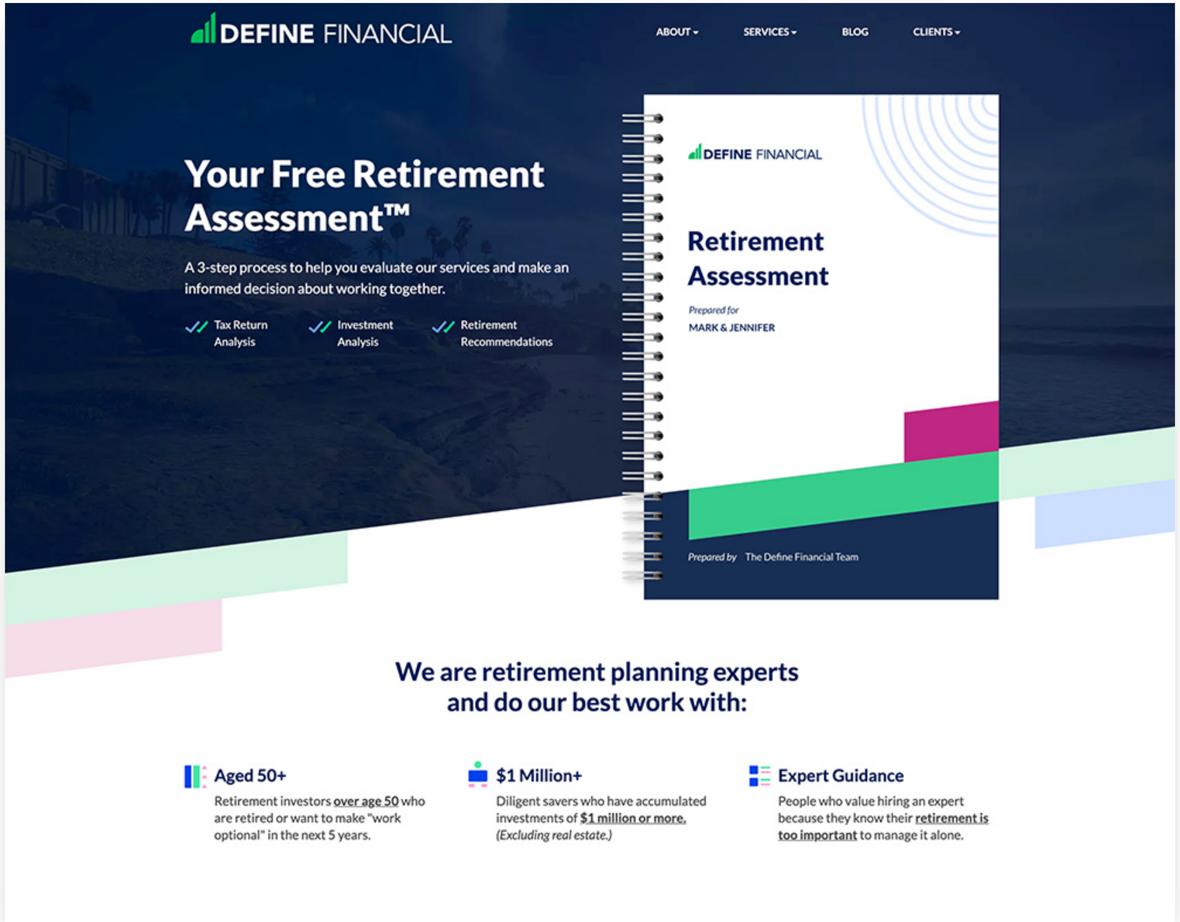
Custom Web Design
for Financial Advisors
Say Goodbye to Customized Web Templates
Get Started
Upgrade to a Custom Website Design
Build your website from the ground up, just like a custom home.
Upgrade from the limited web solutions like Twenty Over Ten and FMG Suites.
Customize your site to your niche & expertise, so you can maximize your marketing & web presence.
Your business deserve a website that...
- creates a unique visual design identity
- speaks to your niche & expertise
- is built on an intuitive WordPress platform
- & includes security / accessibility best practices
Our Work
100% Custom Design.
We never use pre-designed templates. They're for the flies

Conversion Objectives

- Email Opt-In
- Due Diligence
- Lead Generation
- Education

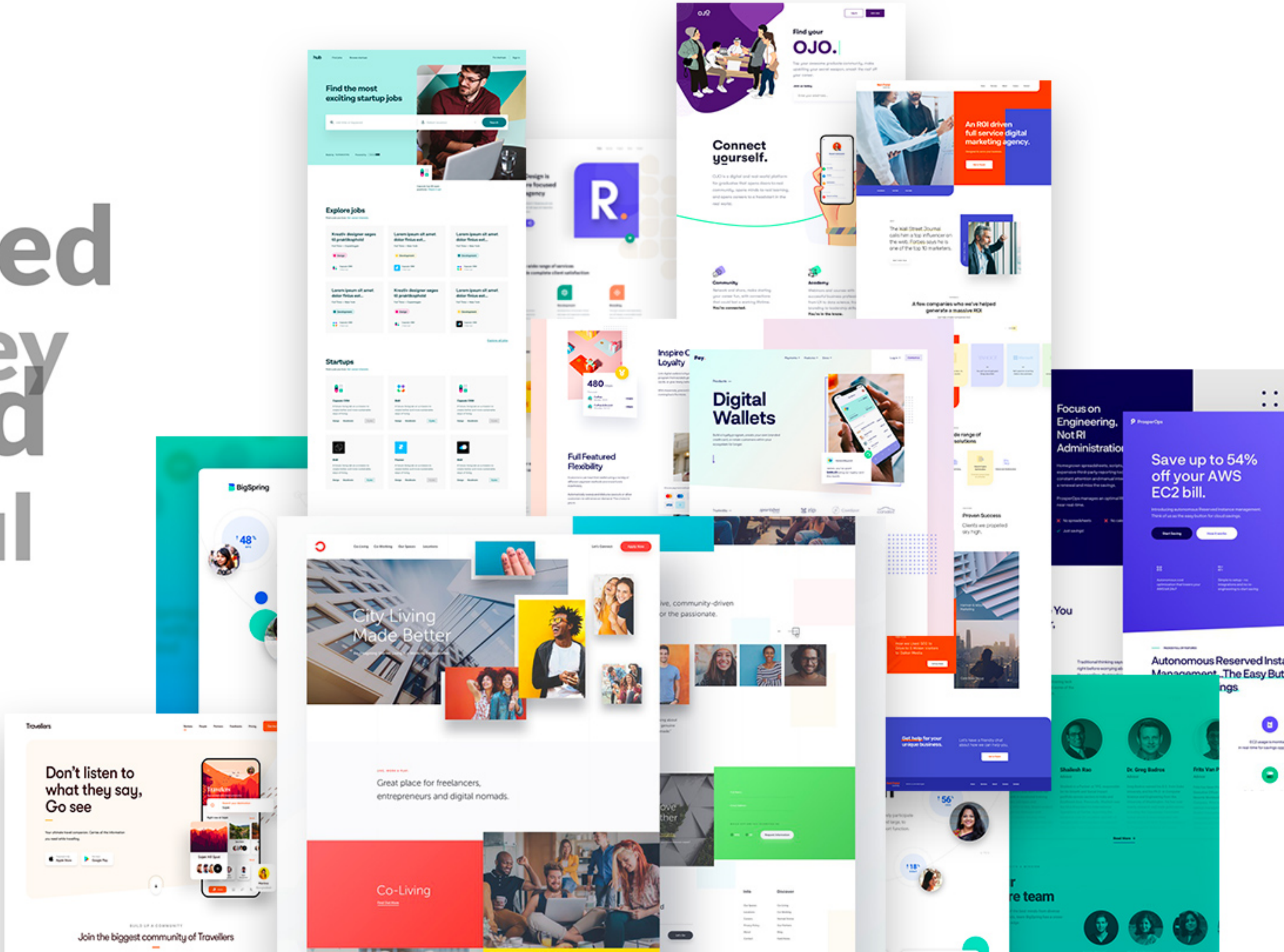
Call to Action



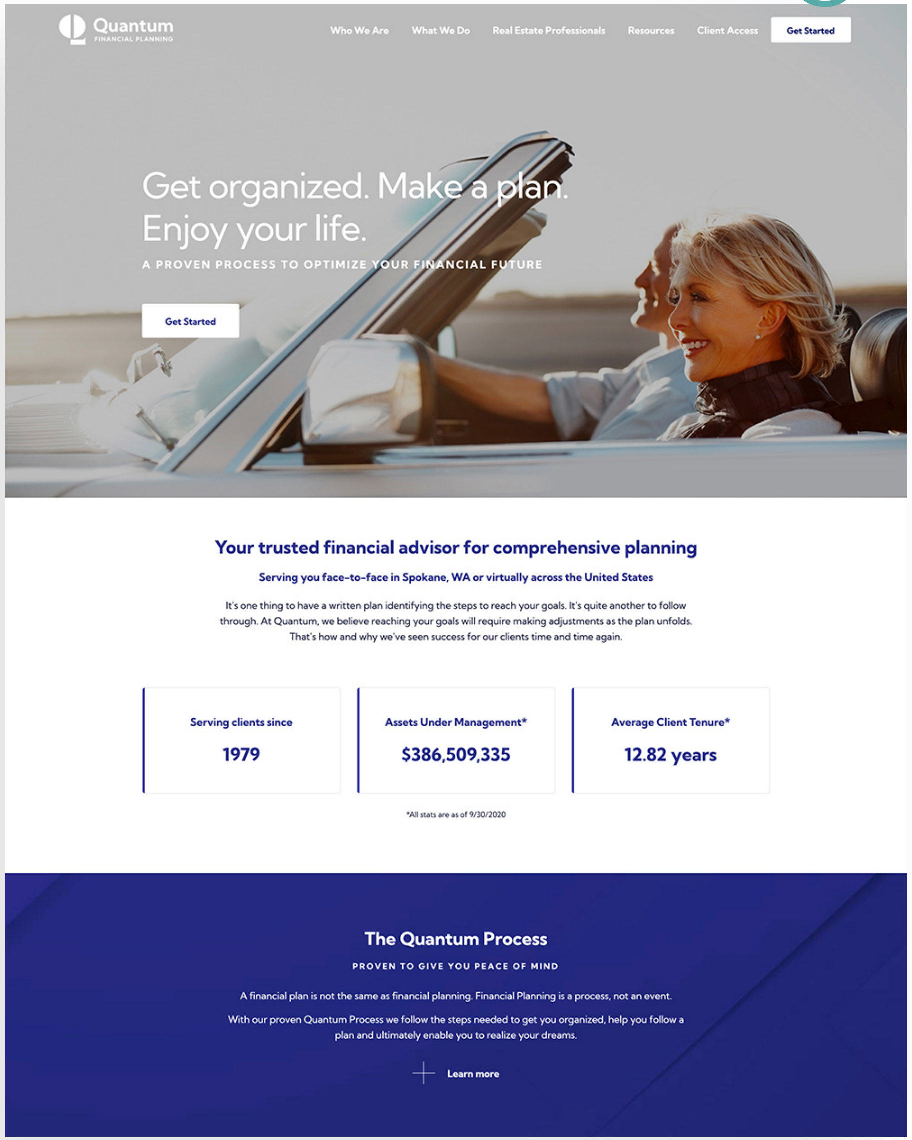


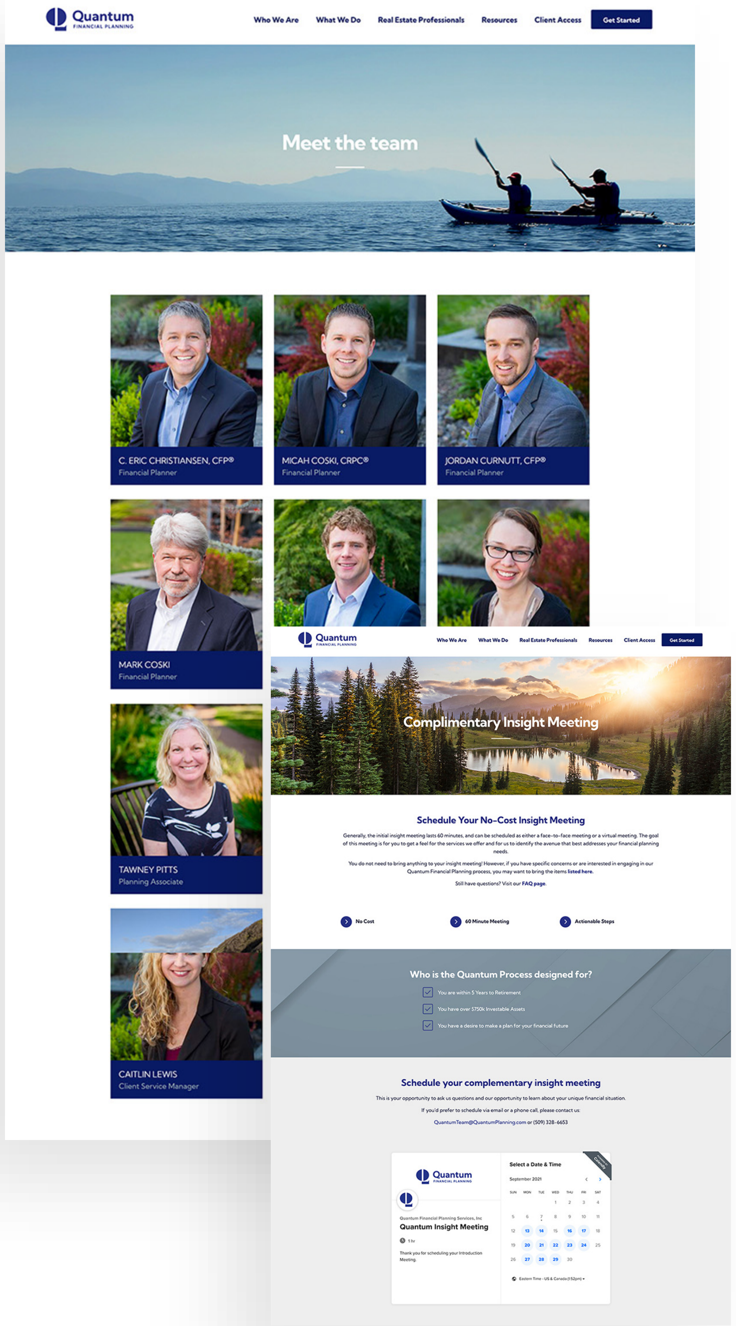
Personality of Brand

Relieved
Customer-Focused
Professional
Silicon Valley
People-Focused
Modern
High-Tech
Playful



Custom Design



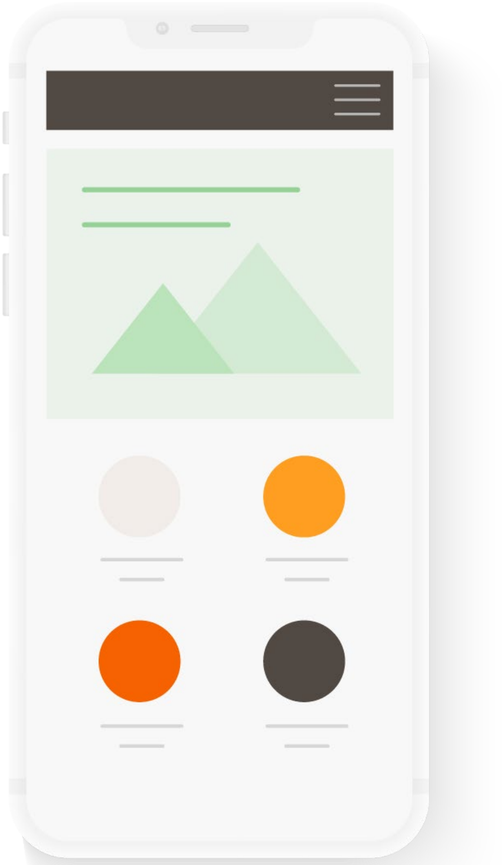


Custom Design

Mobile-Wise Design

Choice of imagery

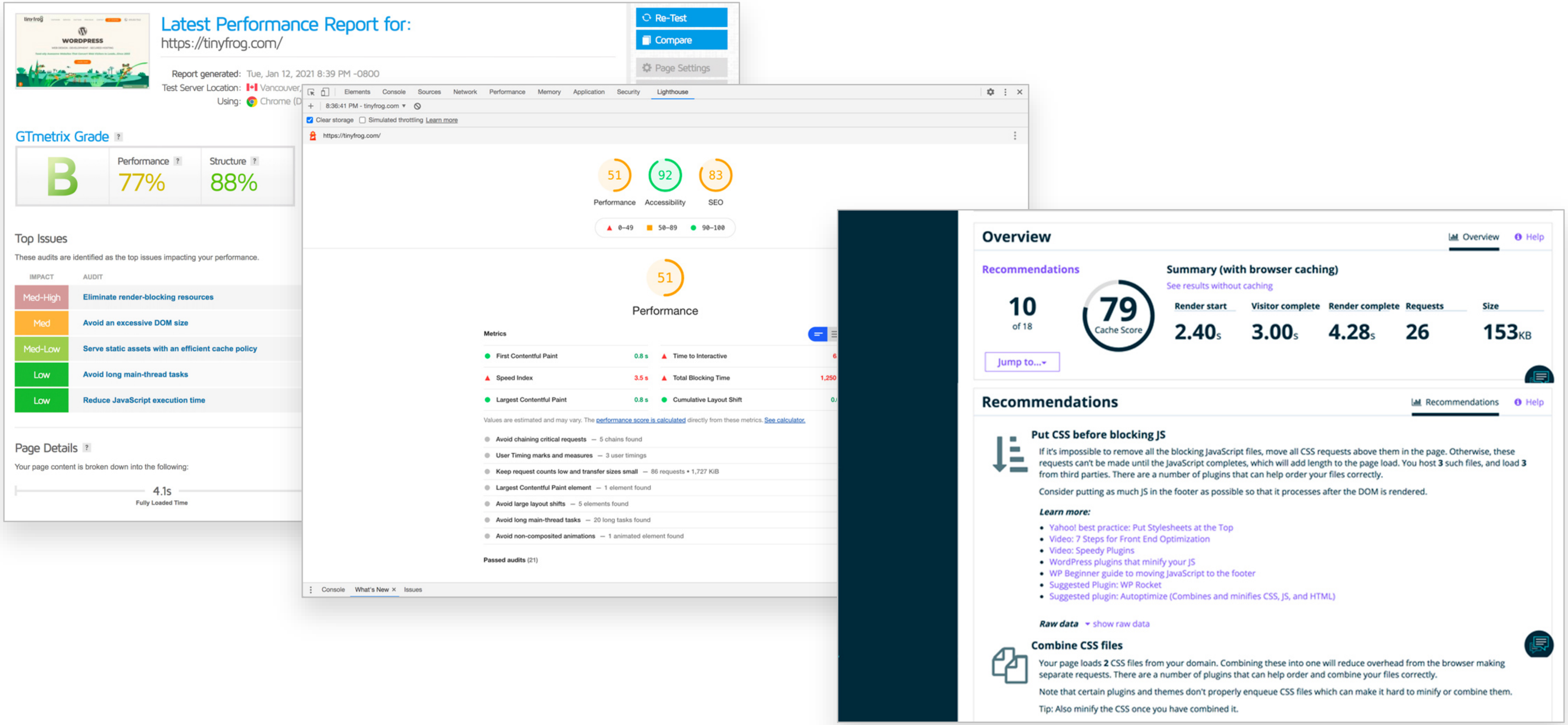
Spacing



Breakpoints

User Experience

Performance & Core Vitals

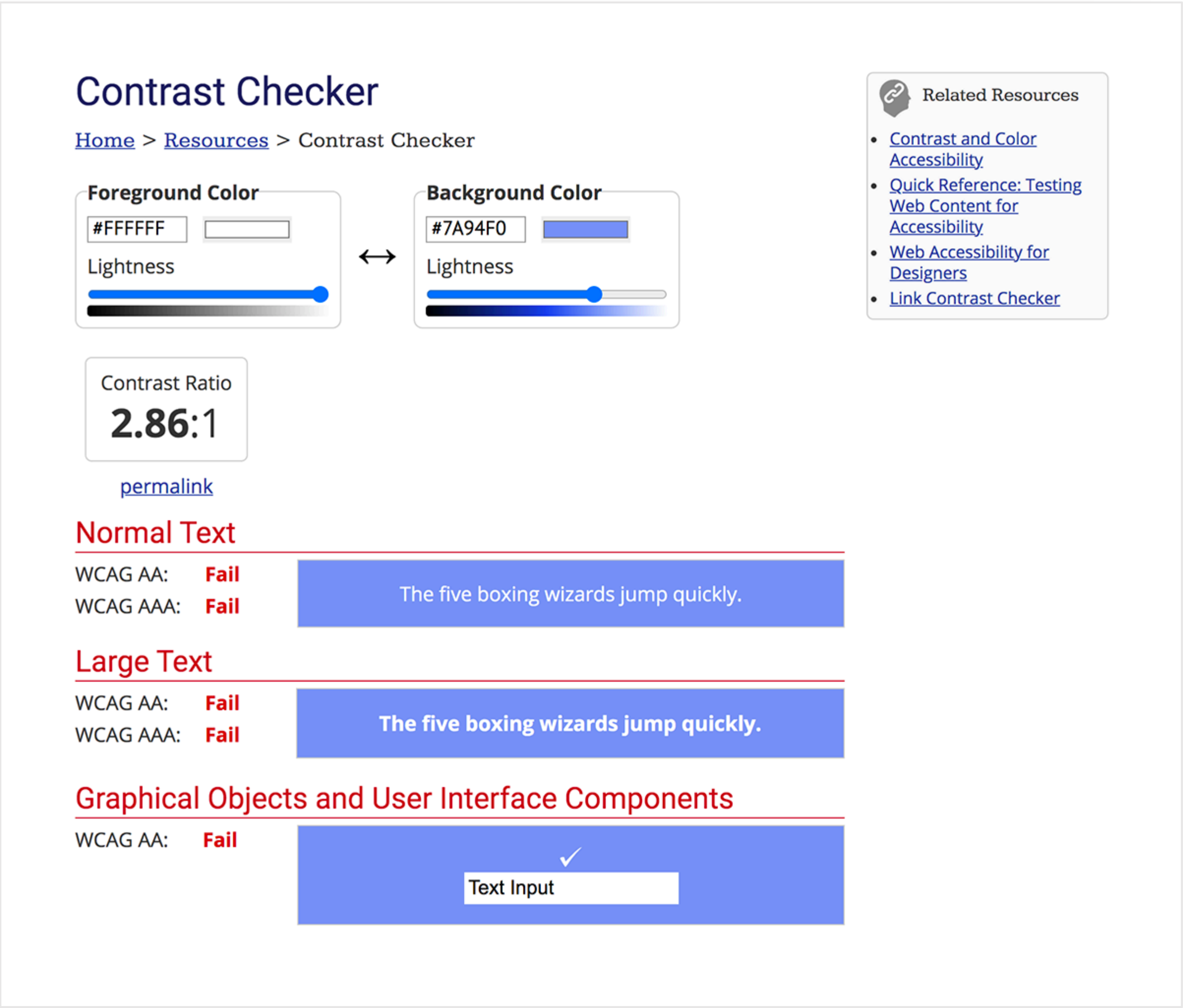


Web Accessibility

- Why Web Accessibility Matters
- Legal Landscape
- WCAG 2.1 AA
- Best Practices for Alt Text, Video, Color Contrast

Color Contrast

- WCAG 2.1 AA Standard
- Color Contrast Tool
- Open Design Layouts



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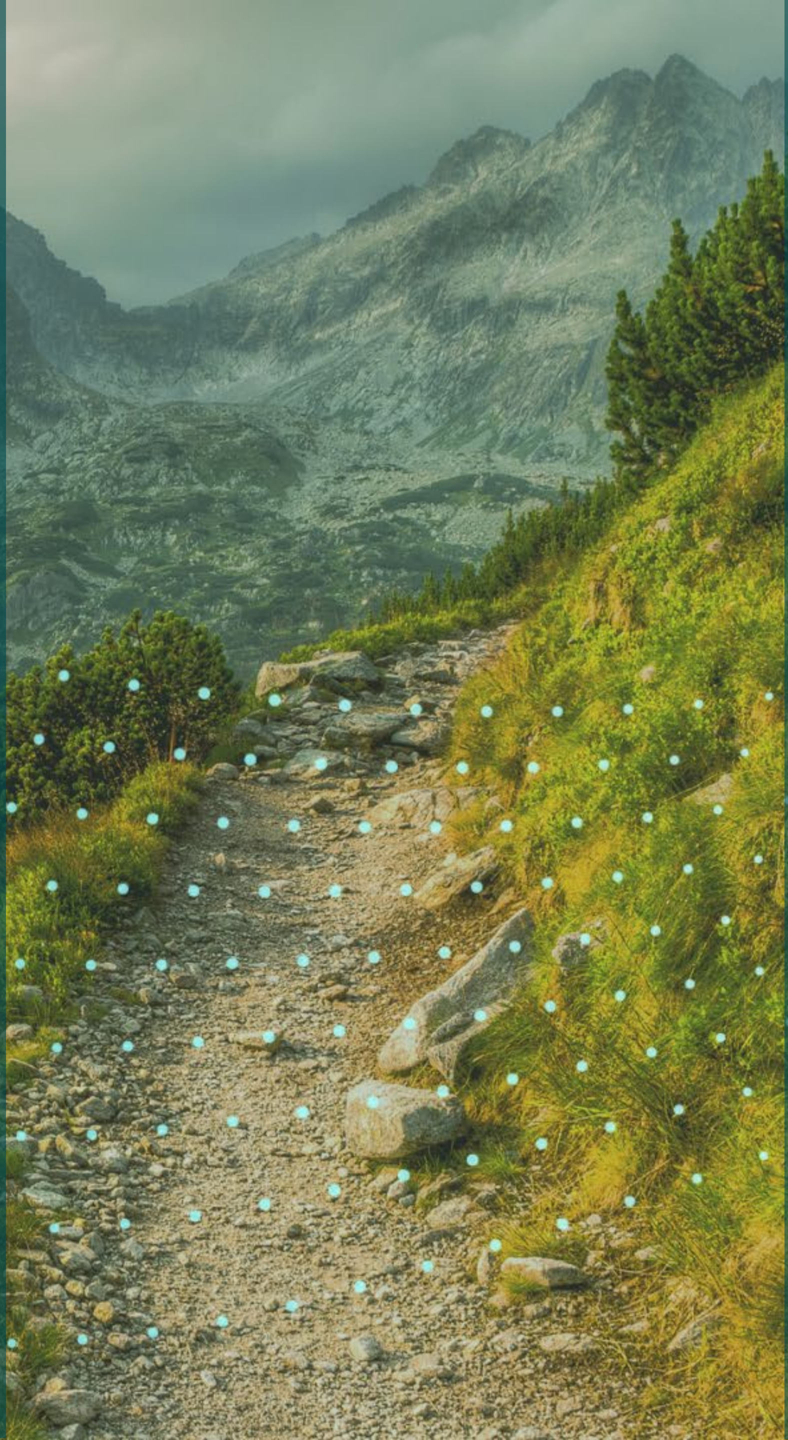
#2

Forbes WSJ CNBC MarketWatch Forbes WSJ

PROGRESS, NOT PERFECTION

- Focus on UX & Digital Brand
- Identify Conversion Objectives
- Create a High-Quality Design
- Build for Performance
- Follow Web Accessibility Guidelines
- Retain trusted partners



LIMITLESS
COACHING PATH


LIMITLESS Q&A