

# Pinnacle Financial Advisors Website

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Advanced Interactive Design II  
GRA-2134C-15205  
Fall 2025  
Jeff Janelle

#### Disclaimer

I would like to acknowledge that I used AI to support this project helping me translate, review, correct text, brainstorm ideas, and give me a little push when my thoughts got stuck. Since English is my second language, I often mix my ideas in both English and Spanish (sometimes full-on Spanglish) just to get the thought flowing. Luckily, AI has been there to understand my "no-sense," untangle the knots in my head, and turn messy ideas into something clear. In other words, AI has been my study buddy, editor, and occasional idea therapist... because sometimes my brain needs coffee, and AI is just faster.



# The Client

**Pinnacle Financial Advisors** offers personalized financial planning services. It was established in 2005 in the heart of the Bay Area, San Francisco, CA.

Founded by three women who left Wall Street, the firm is known for a client-first approach that focuses on ethical, long-term wealth building.

They manage over \$750M in assets and offer bespoke planning solutions.





# The Client

Industry: Financial Planning

Address: 200 Market St, San Francisco, CA 94105

Phone: (415) 555-0123

Fax: (415) 555-0124

Contact: Jordan Lee, Senior Financial Advisor

Email: [j.lee@pinnaclefa.com](mailto:j.lee@pinnaclefa.com)



# Goals & Vision

## Five Year Goals:

- Introduce a client app with budget and goal tracking tools.
- Expand into estate and tax planning services.
- Launch a quarterly financial wellness newsletter and podcast.

## Ten Year Vision:

- Open satellite offices in five new markets.
- Be recognized as a top national firm for women-led financial planning.
- Transition to 100% sustainable investment portfolios.



# Brand Needs

Pinnacle is looking for a fresh, modern logo using greens and blues, with an upward arrow or peak motif to suggest financial growth. Clean, minimalist typography is preferred.

A fresh and modern site is needed to present services, staff credentials, and news.

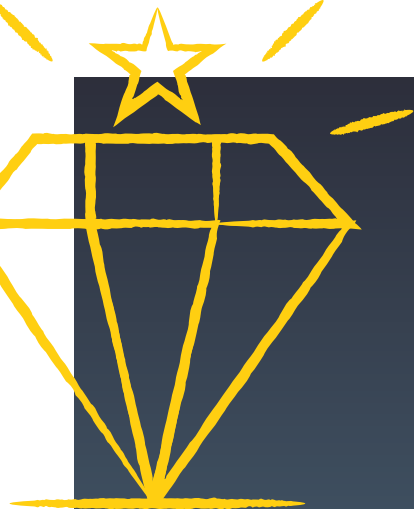
The client dashboard should allow users to view portfolios and schedule consultations.



# The Challenge

C-suite has just approved a full rebrand and wants a cutting-edge web presence that:

- Showcases their enterprise-grade services
- Generates qualified leads via clear CTAs
- Reassures visitors with modern design and trust signals
- Retains existing clients through a self-service Customer Dashboard



# The Solution

Create an new fresh image for **Pinnacle Financial Advisors** as tomorrow's market leader delivering an immersive, intuitive web experience and a dashboard that feels real, using HTML/CSS toolkit to solve authentic business goals.

The new site will include (5) five pages as follows;

Home

About

Services

Contact

Dashboard (dropdowns , links , charts animate)

A blue target icon with concentric circles and a central bullseye, with a blue arrow pointing towards the center from the top-left. The target is partially cut off by the left edge of the slide.

# Target Market

## Demographics

Age Range: 35 to 65 years old

Gender: Emphasis on women (since the firm is women-led and aiming for recognition in that space).

Income Level: Household income  
\$150k–\$500k+; investable assets \$500k+

Occupation: Mid-to-senior-level professionals, executives, business owners, and dual-income families.

Location: Bay Area (primary), with plans to expand nationally in urban/suburban hubs

Education: Bachelor's degree or higher; many with postgraduate education

A blue target icon with concentric circles and a central bullseye, with a blue arrow pointing towards the center from the top right. The target is partially cut off by the left edge of the slide.

# Target Market

## Lifestyle & Psychographics

Values: Trust, ethics, long-term security, socially responsible investing.

### Financial Priorities:

- Wealth building for retirement
- Tax efficiency and estate planning
- Funding education (college savings)
- Managing investments with minimal risk

### Behaviors:

- Tech-comfortable (wants apps/dashboards for tracking finances)
- 
- Leans toward ethical investing and sustainability
- 
- Prefers personalized, human-centered advice but also digital convenience



# Target Market

Lifestyle & Psychographics

## Pain Points:

- Seek simplicity and clarity because they may not be finance experts.
- Financial jargon feels overwhelming
- Fear of poor investment decisions in volatile markets
- Limited time to research or manage finances

## Lifestyle Indicators:

- Busy professionals balancing careers and family life
- Health-conscious, community-involved
- Interested in personal development (podcasts, newsletters, coaching)



# User Persona

Jennifer Donnelly

*"I want my money to grow, but also to make a positive impact."*

## Goals

- Preparing for retirement
- Interested in sustainable investments
- Wants to leave a clear estate plan for her family.

## Challenges

- Skeptical of large banks.
- Wants ethical investing but isn't sure which funds are trustworthy.
- Needs clear, jargon-free communication.

Age: 54

Occupation: Healthcare Administrator

Income: \$160,000/year

Location: Palo Alto, CA

Family: Married, one adult child in college-senior

## Values

- Ethics, trust, long-term security, and female leadership resonates strongly with her.

## Communication Preferences

- Reads newsletters, listens to podcasts, uses apps but appreciates simplicity.

## Potential Pain Points

- Finding trustworthy financial advisors who understand her values
- Navigating complex financial jargon and products
- Balancing her desire for ethical investing with the need for financial returns

She represents the conscious pre-retiree who resonates with Pinnacle's women-led, sustainable, ethical approach.



# User Persona

Nataly Orozco

*"I want my investments to reflect my values and make a positive impact on the world."*

Age: 36

Occupation: Marketing Specialist

Income: \$85,000/year

Location: San Francisco, CA

Family: Single, focused on career growth

## Goals

- Build a solid investment portfolio for long-term financial growth
- Support companies that align with her values
- Learn more about personal finance and investing basics

## Values

- Social Responsibility, authenticity and interested in connecting with like-minded individuals who share her financial values

## Potential Pain Points

- Finding trustworthy financial advisors who understand her values
- Navigating complex financial jargon and products
- Balancing her desire for ethical investing with the need for financial returns

## Challenges

- Limited knowledge of investing and personal finance
- Difficulty identifying trustworthy socially responsible investment options
- Unsure how to get started with investing as a beginner

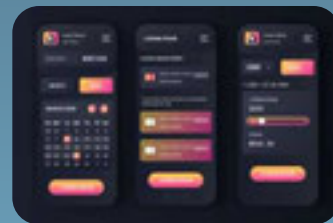
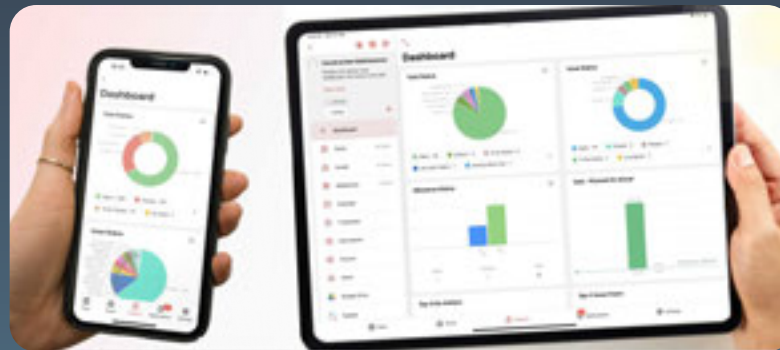
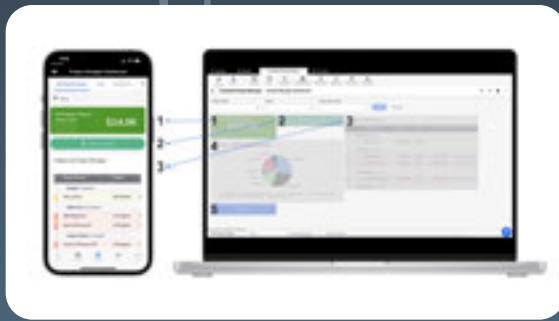
## Communication Preferences

- Very active on social media (IG, X)
- Podcasts and YouTube videos on personal finance and investing
- Prefers online resources and apps that offer clear educational content and investment tools

She represents a younger, impact-driven market segment that Pinnacle could attract through: Educational content, Sustainable investment portfolios and Community-driven branding

# Research & Inspiration

Dashboard Desktop  
vs Mobile





# Research & Inspiration

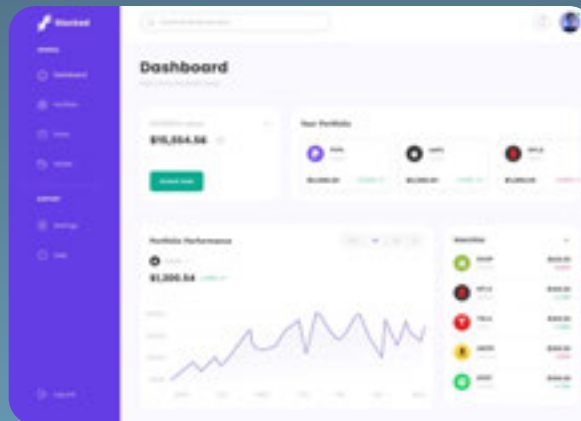
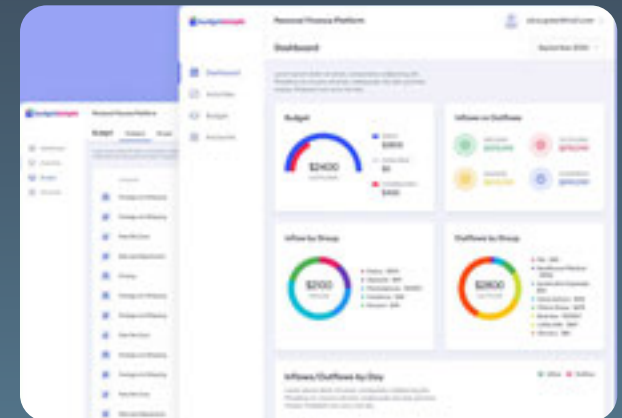
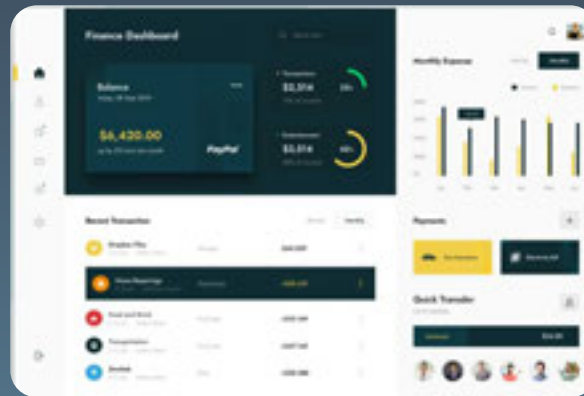
Dashboard User friendly & easy





# Research & Inspiration

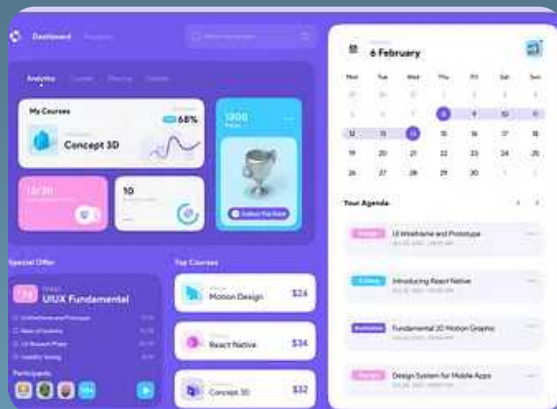
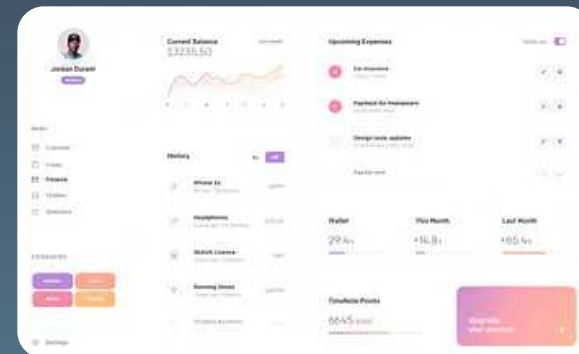
Dashboard  
Desktop





# Research & Inspiration

Dashboard clean layout



# Research & Inspiration

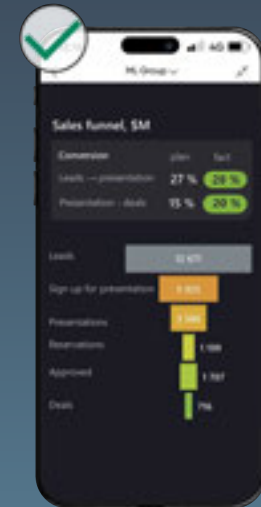
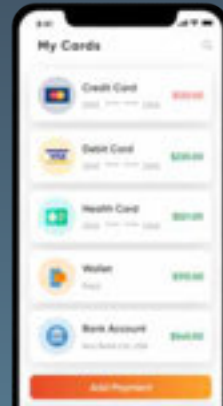
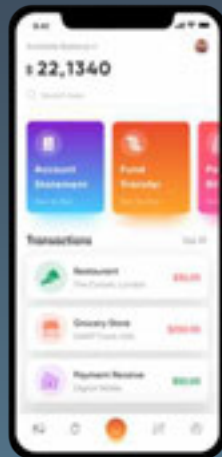
Palette Color  
Client's need





# Research & Inspiration

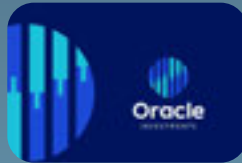
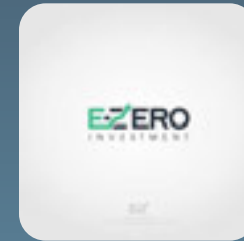
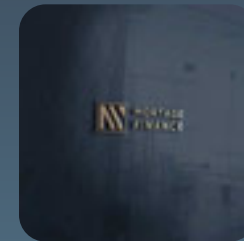
Dashboard in  
Mobile





# Research & Inspiration

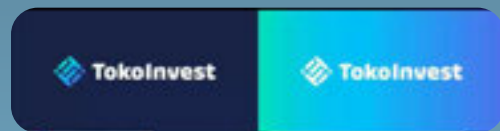
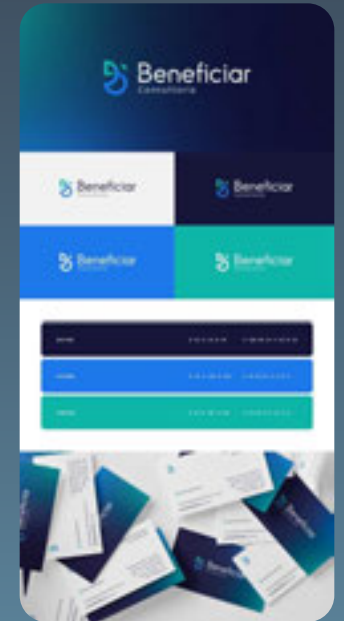
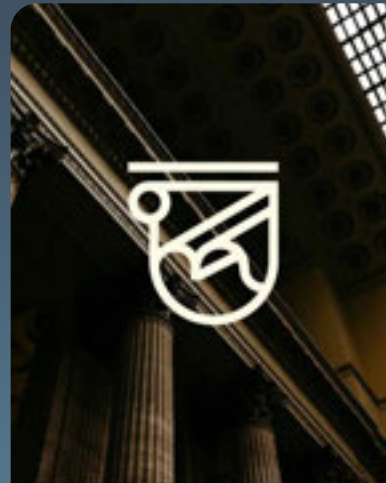
Logos





# Research & Inspiration

Branding





# Research & Inspiration

website  
layout  
finance  
industry

The screenshot shows the Anaplan website homepage. At the top, there's a navigation bar with the Anaplan logo and links for Home, Product Overview, Resources, and Contact. The main headline reads "When you have to make the right decisions — right now". Below this, there's a sub-headline and a "Learn more" button. A photo of a person working at a computer is visible. Further down, there's a section titled "Make silos a thing of the past" with a sidebar menu listing "Finance", "Sales and marketing", "Supply chain", and "HR and workforce". The "Sales and marketing" section is expanded, showing various data visualizations like bar charts, line graphs, and maps. At the bottom, there's a section "Solutions tailored to your industry" with a sidebar listing "Aerospace/defense", "Manufacturing", "Energy", "Retail and consumer goods", "Healthcare and life sciences", and "Professional and business services". The "Manufacturing" section is highlighted, showing images of industrial machinery.

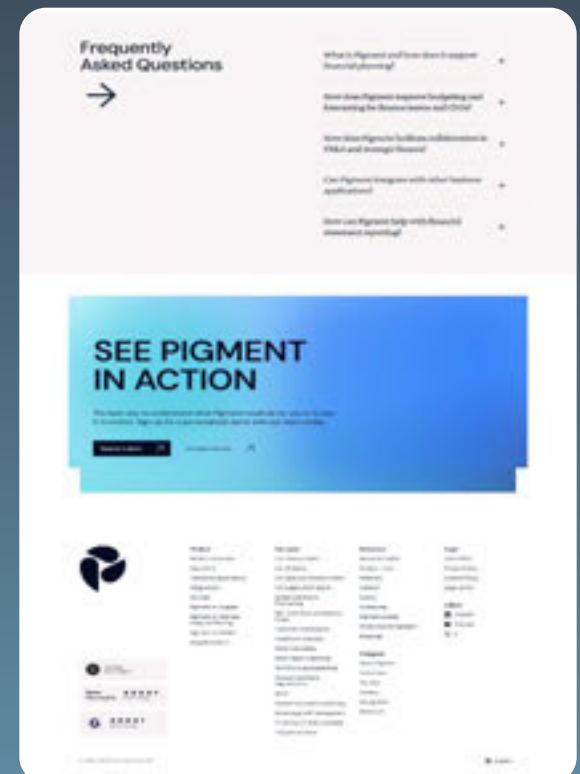
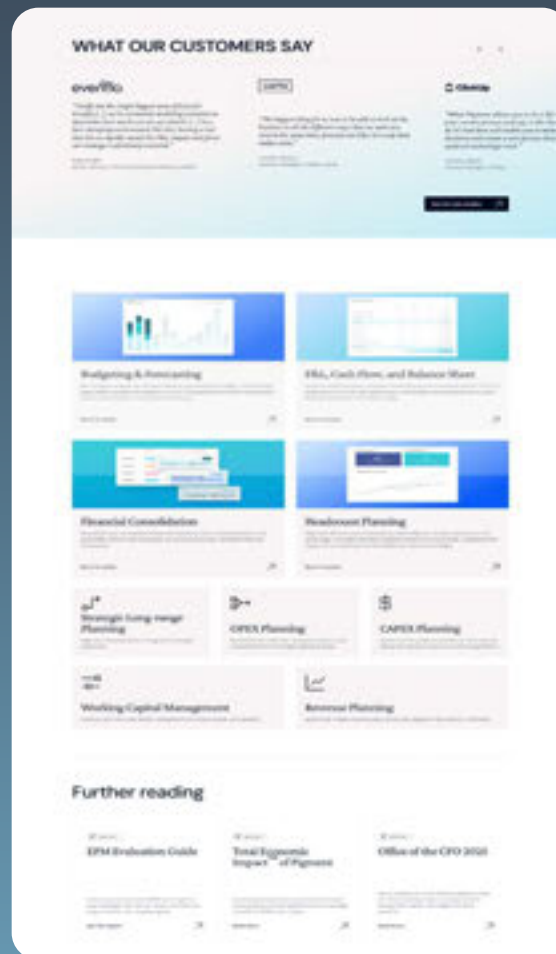
This screenshot shows a research page on the Anaplan website. The top section asks "What are top analysts saying about Anaplan?" and features two quote boxes from Gartner and IDC. Below this is a section titled "Be a leader, not a lagger. Boost shareholder return by 14%." which includes a photo of a woman and a "Read the report" button. The next section states "Over 2,500 of the world's best brands plan with Anaplan. Be the next." and features a carousel of logos including JLR, LinkedIn, and others. The bottom section is titled "Outpredict, outplan, and outperform with Anaplan Intelligence" and lists various capabilities like "Data and analytics", "Forecasting", "Collaboration", and "Integration".

This screenshot shows a product overview page on the Anaplan website. The main headline is "Discover the platform industry leaders trust. Be the next." with a "Learn more" button. Below this is a grid of product categories: "Anaplan Cloud", "Platform", "Solutions", "Resources", "Company", and "About Anaplan". Each category has a list of sub-items. At the bottom, there's a "Get a demo" button and social media icons.



# Research & Inspiration

website  
layout  
finance  
industry







# Research & Inspiration

website  
layout  
finance  
industry

Get actionable insights with the AI-powered FP&A platform

What are your biggest FP&A needs?

- Consolidation
- Forecasting
- Reporting & Analysis
- Collaboration
- AI-Powered Insights

Access all your data in one place

The flexibility of Excel. The power of Datarails.

Let your data tell the story

How did revenue change?

Datarails. Powered by AI

Which tasks can Datarails help you with?

Task	Manual	Datarails
Consolidation	Hours	Minutes
Forecasting	Hours	Minutes
Reporting & Analysis	Hours	Minutes
Collaboration	Hours	Minutes
AI-Powered Insights	Hours	Minutes

Trusted by finance teams across many industries

Spend more time analyzing data and less time collecting it

Revolutionize your FP&A with cutting-edge AI

Fast finance requests

Learn why finance teams choose Datarails



# Research & Inspiration

Content Services

Morgan Stanley

## Personal Finance

500K

- 500K Planning for Your Future
- What to Do Now to Prepare for Retirement
- 5 Things You Should Know About Your 401(k)
- How to Invest in the Stock Market
- What's a Good Time to Buy a House?
- How to Choose the Right College for Your Child
- How to Choose the Right Insurance Policy
- How to Choose the Right Investment Strategy

Sign up to get Morgan Stanley's Five Ideas newsletter delivered weekly to your inbox.

First Name (Required)

Subscribe

Promand

500K

Zencoder

500K

OrthoSynetics

500K

XYPEX

500K

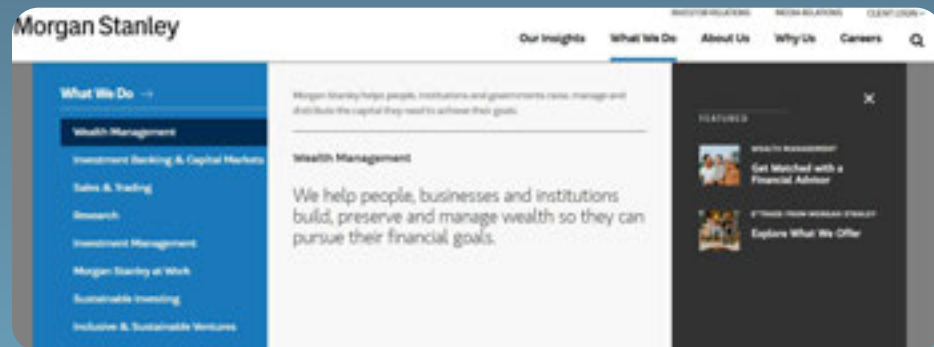
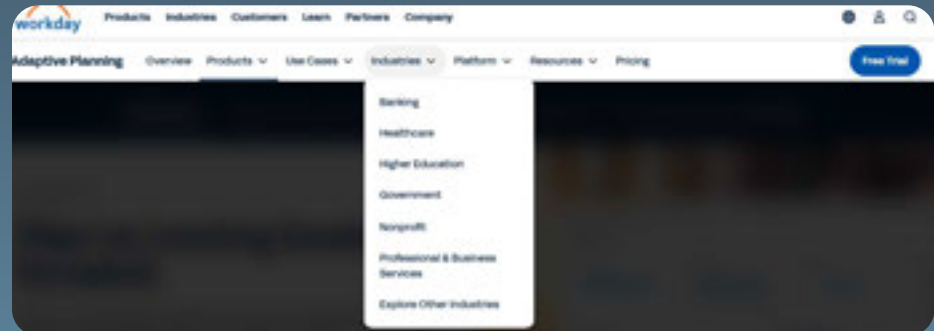
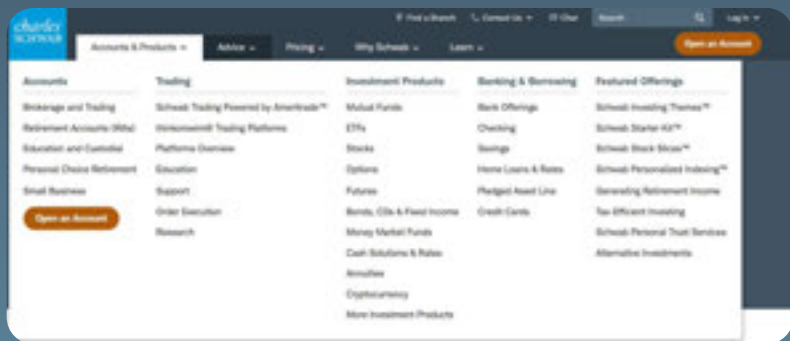
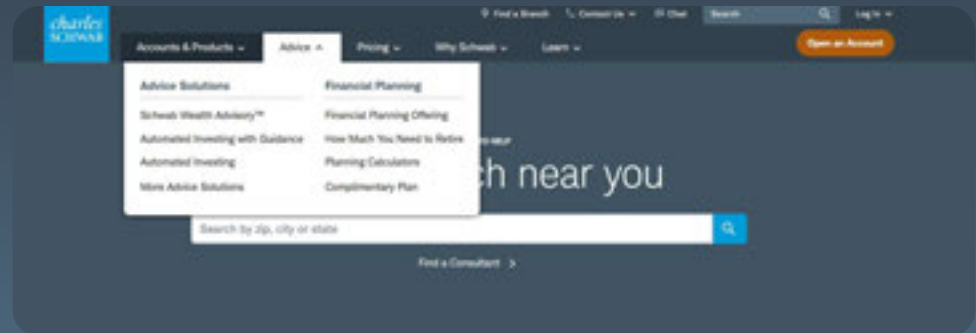
Discover how Datarails helps you plan ahead

Articles

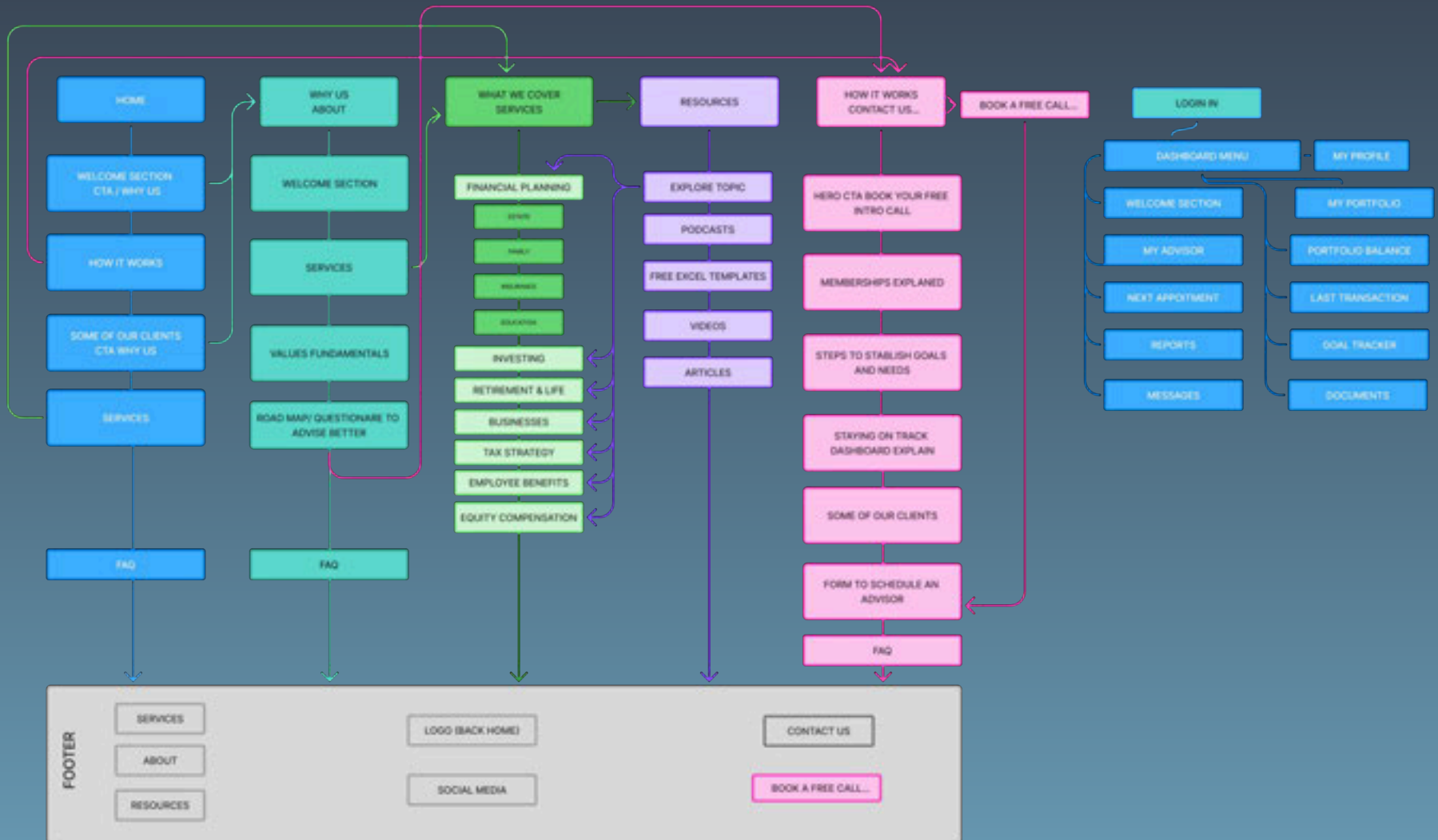


# Research & Inspiration

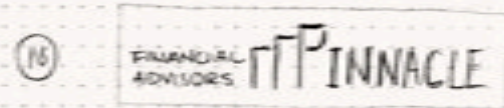
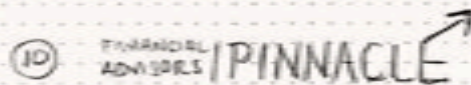
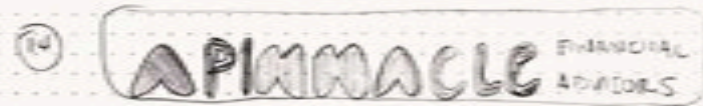
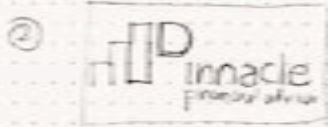
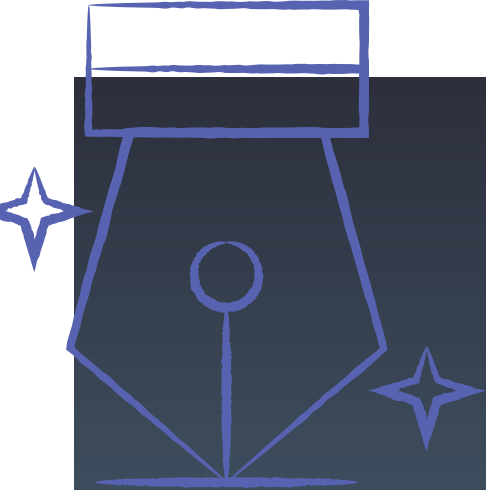
Content Nav



# Site Map



# Sketches



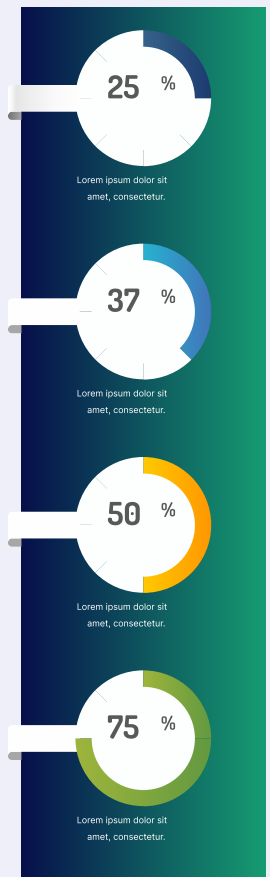
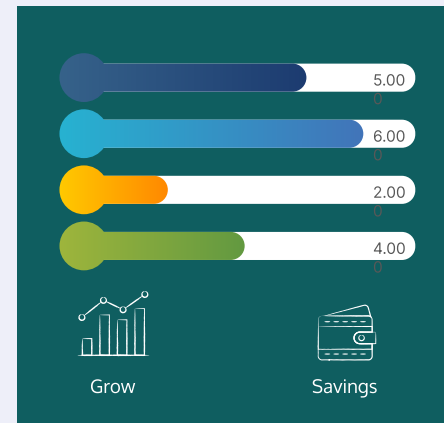
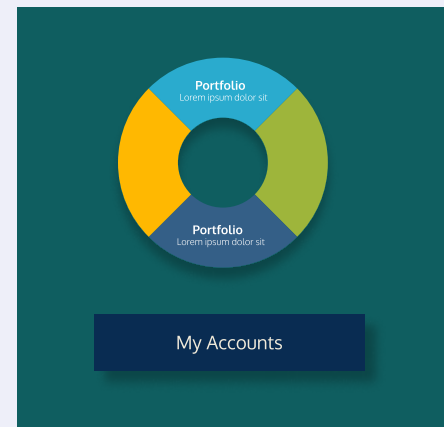


# Heading

## Subheading

Body text

Get Started



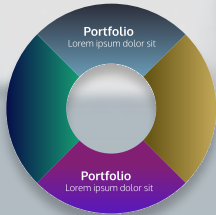
Get Started

Get Started

Get Started



# YOUR PATH TO CONFIDENT FINANCIAL GROWTH



My Accounts



**HEADLINE**

lorem text simple to click



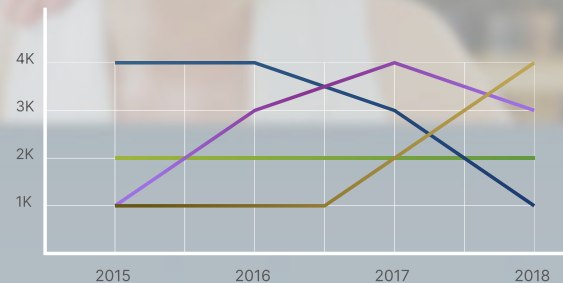
**HEADLINE**

lorem text simple to click



**HEADLINE**

lorem text simple to click



Reports

**01**

**STEP 1**  
Lorem text do this do that

**02**

**STEP 1**  
Lorem text do this do that

**03**

**STEP 1**  
Lorem text do this do that

**04**

**STEP 1**  
Lorem text do this do that

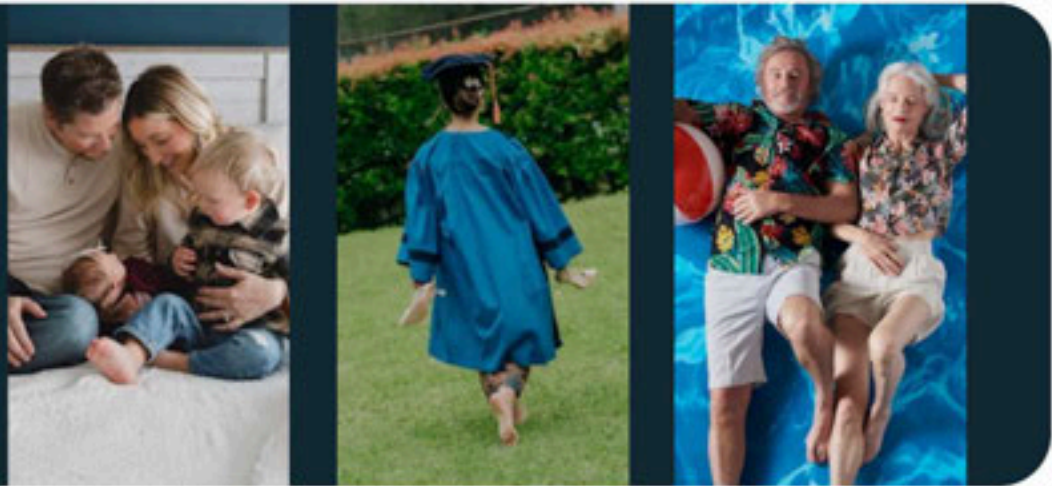
Reports

Reports



# YOUR PATH TO CONFIDENT FINANCIAL GROWTH

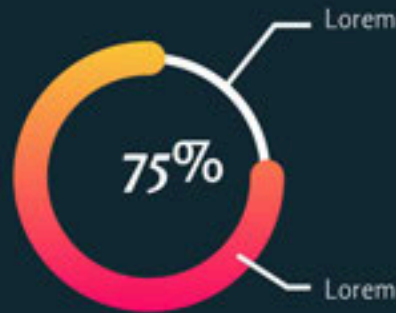
Get Started



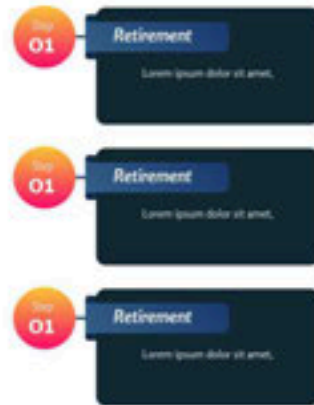
## Retirement Plan

Lorem text with explanation

Get Started

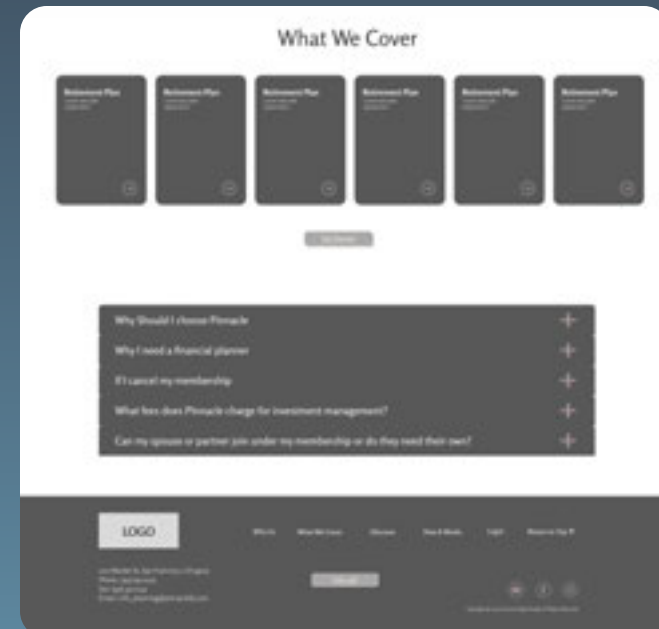


Retirement Plan



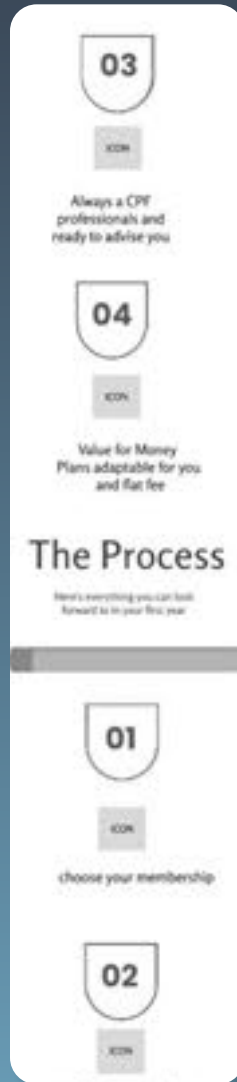
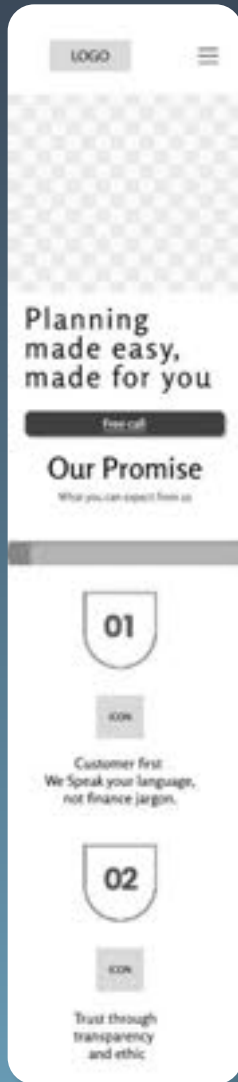
# Wireframes

## Home-Desktop



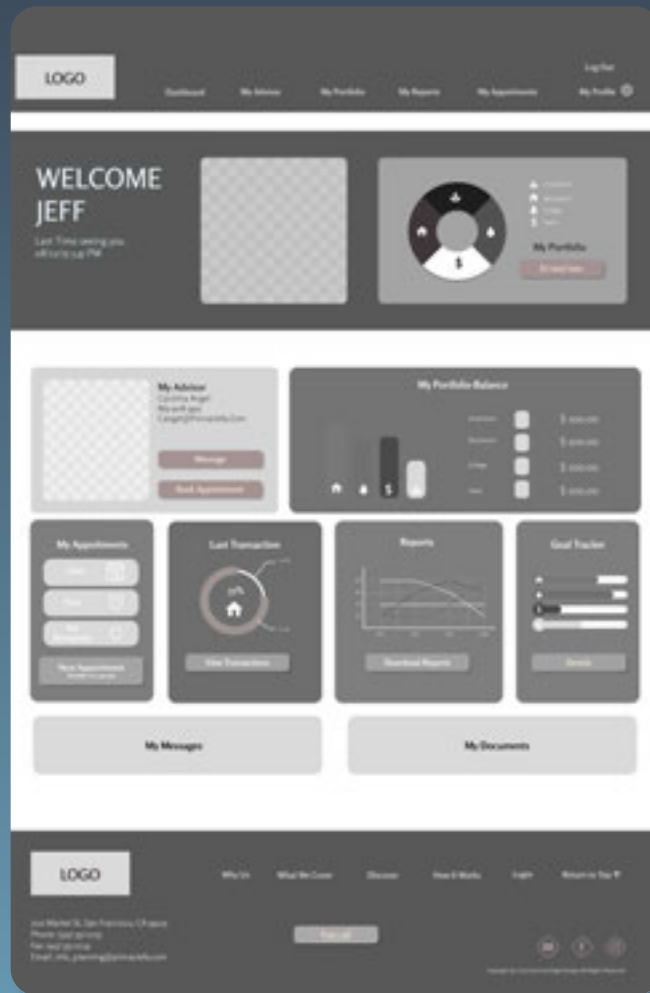
# Wireframes

## Home-Mobile



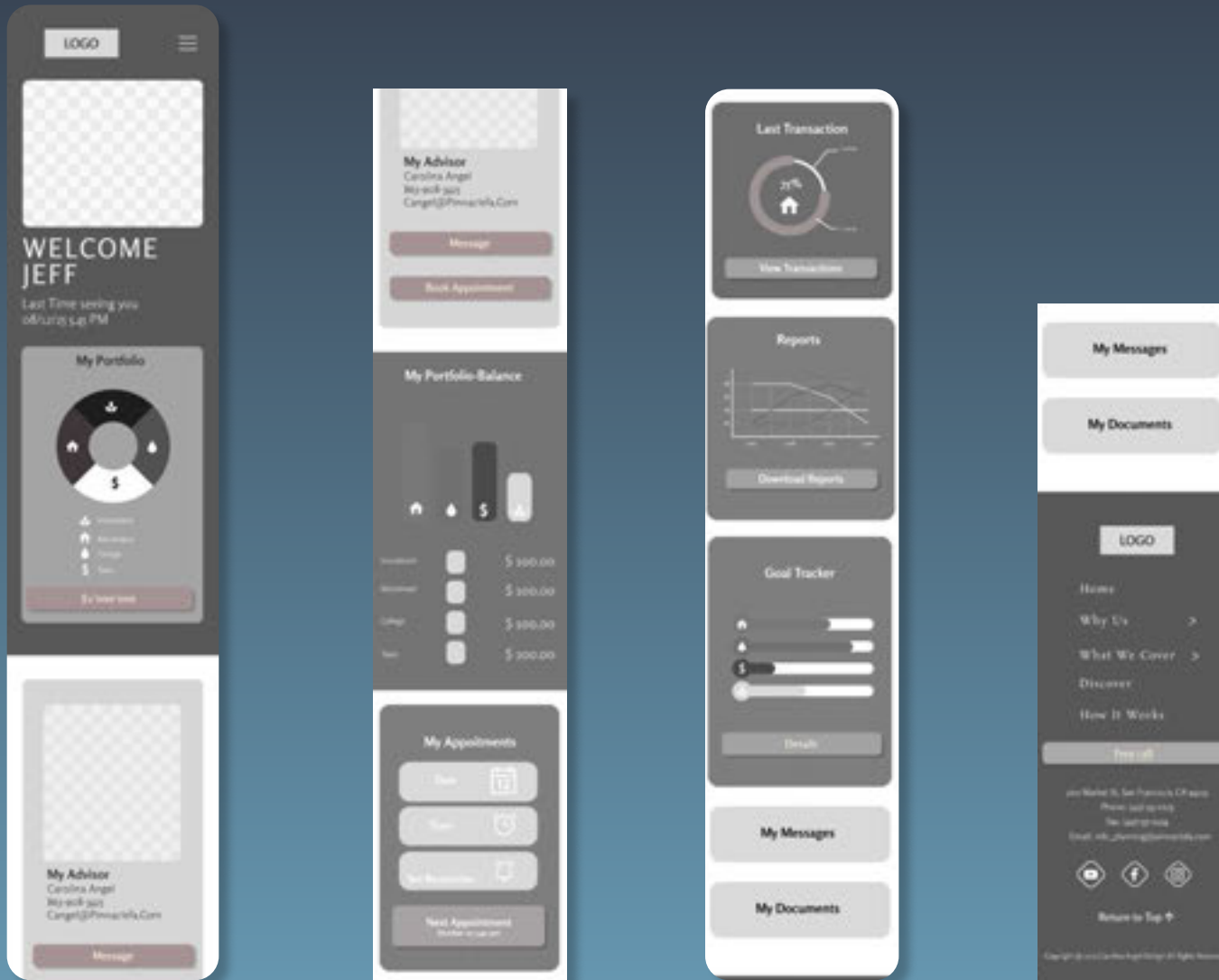
# Wireframes

## Dashboard-Desktop



# Wireframes

## Dashboard-Mobile

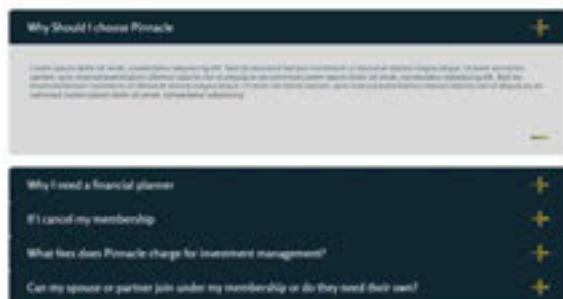


# Comps Elements

Cards to display text and heavy content

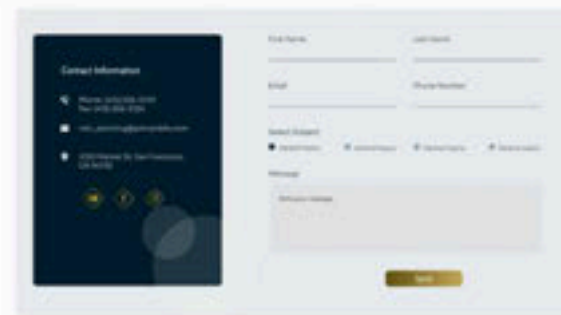


Drop down list for FAQ section  
and display heavy content



Contact Us

Any question or remark? Just write us a message!



Headline H1

Headline H2

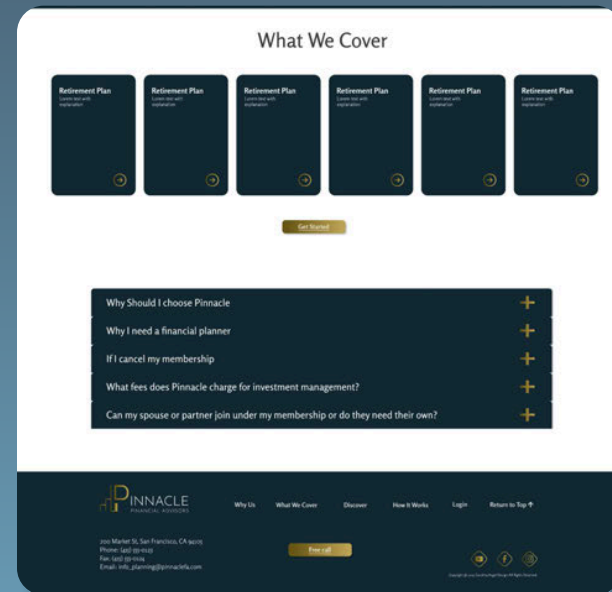
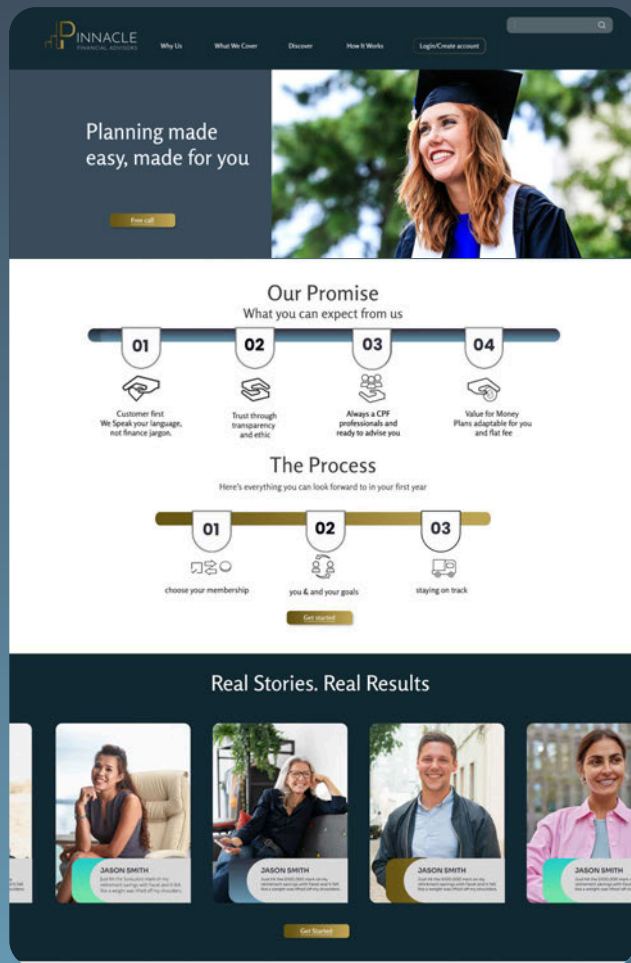
Headline H3

Headline H4  
This is a sample headline text. It is used to demonstrate the visual hierarchy and readability of the text elements in the design system.

Color Swatches



# Comps Homepage



# Comps Dashboard

The dashboard is titled "Pinnacle Financial Advisors" and is personalized for "Carmen". It features a navigation bar with links for "Why Us", "What We Cover", "Discover", and "How It Works". The main content area includes a "WELCOME CARMEN" message with a profile picture, an "Account Settings" gear icon, and a "My Portfolio" section with a donut chart and a list of categories: Investment (\$400,000), Retirement (\$100,000), College (\$20,000), and Taxes (\$1,500), totaling \$587,000. Below this are four widgets: "My Advisor" (Carol Smith), "My Portfolio-Balance" (bar chart), "My Appointments" (calendar), "Last Transaction" (0% College), "Reports" (line chart), and "Goal Tracker" (progress bars). At the bottom, there are buttons for "My Documents" and "My messages". The footer contains the company logo, contact information (200 Market St, San Francisco, CA 94102), a "Free call" button, and social media icons.

**WELCOME CARMEN**

**My Portfolio**

- Investment: \$400,000
- Retirement: \$100,000
- College: \$20,000
- Taxes: \$1,500
- Total: \$587,000**

**My Advisor**

Carol Smith  
949.466.2900  
carol@pinnaclefa.com

Message | Book Appointment

**My Appointments**

Date | Time | Set Reminder | Next Appointment: October 12, 2023

**Last Transaction**

0% College | View Transactions

**Reports**

Download Reports

**Goal Tracker**

Details

**My Documents** | **My messages**

**Pinnacle Financial Advisors**

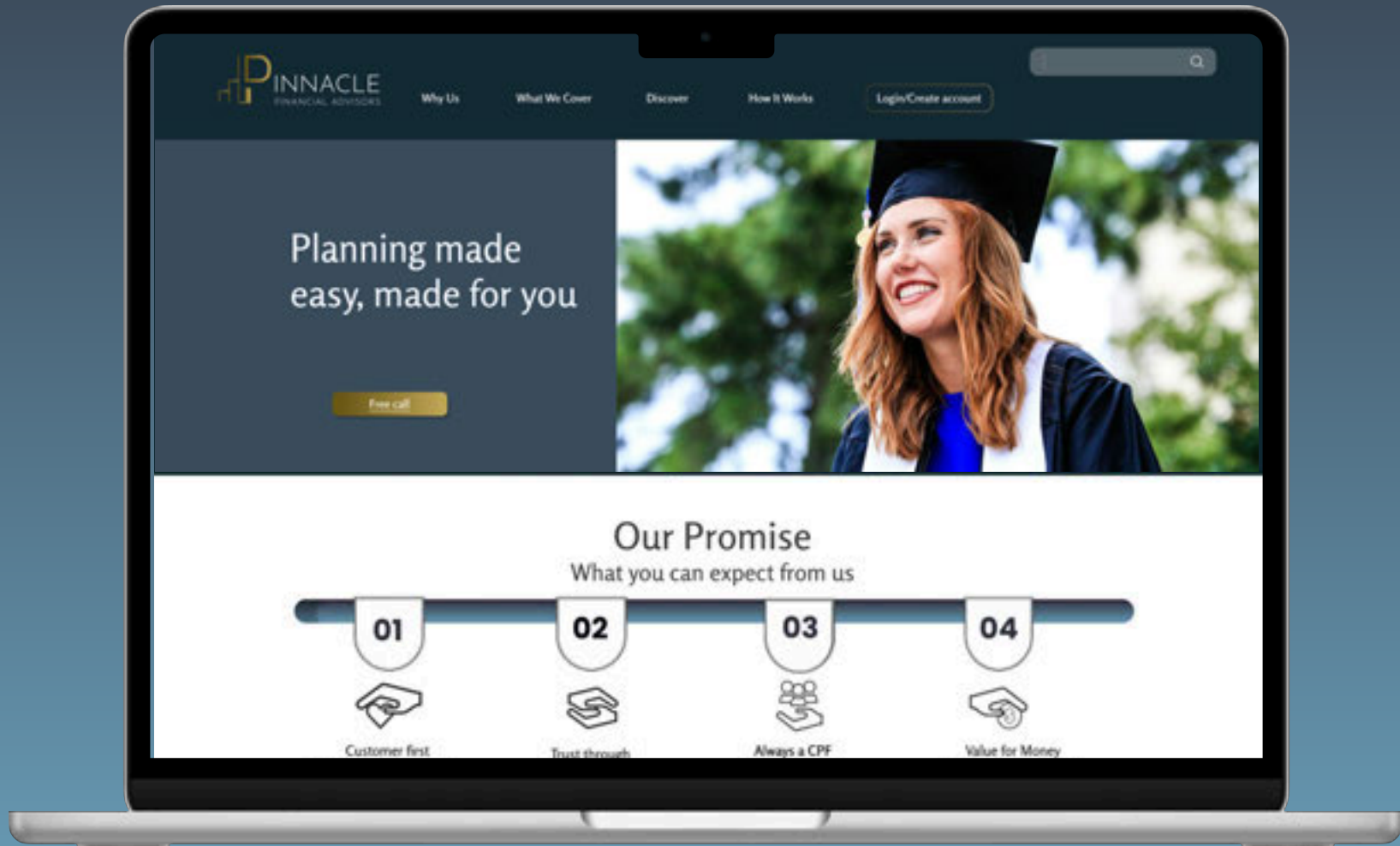
200 Market St, San Francisco, CA 94102  
Phone: 415.399.0122  
Fax: 415.399.0124  
Email: info\_planning@pinnaclefa.com

Free call

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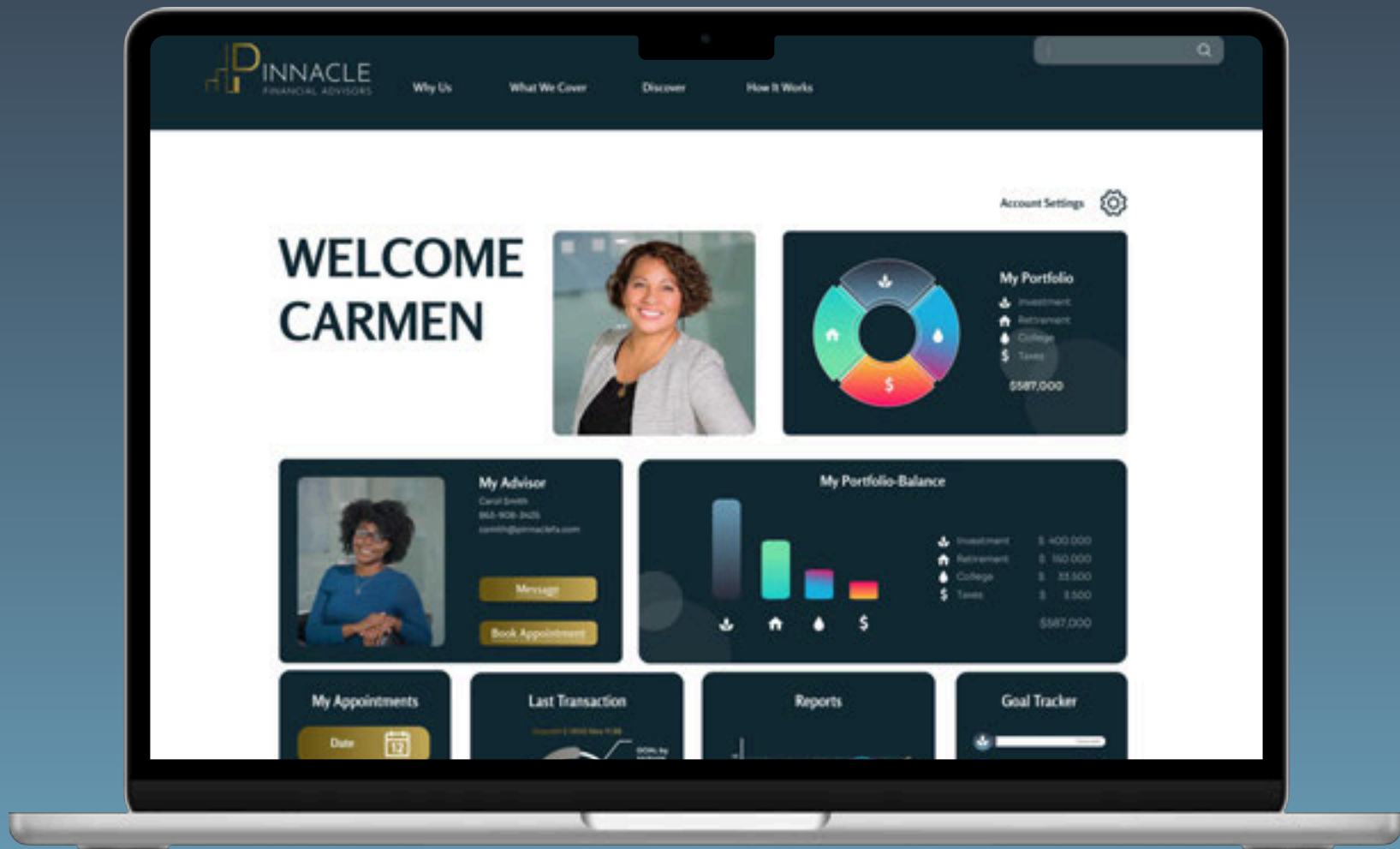
# Mockups

## Homepage



# Mockups

## Dashboard



# Prototyping



[https://www.figma.com/proto/7HQsZWopM3f72m9nUoPZ8x/  
C\\_Angel\\_Comps\\_P2?page-id=2188%3A1949&node-  
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KBa-1&scaling=min-zoom&content-scaling=fixed&starting-point-node-  
id=2188%3A1950](https://www.figma.com/proto/7HQsZWopM3f72m9nUoPZ8x/C_Angel_Comps_P2?page-id=2188%3A1949&node-id=2188-1950&viewport=-950%2C-1980%2C0.18&t=fVtzTw1TXcPNiKBa-1&scaling=min-zoom&content-scaling=fixed&starting-point-node-id=2188%3A1950)



**The End**  
**THANK YOU**