

Option 1

- Four steps to walk the user through
- Moved right column to the bottom
- Changed layout to match Fast path type style

Once the user clicks on Open an account, a box would appear underneath (all other content slides down). Continue button does not display until you have chosen a required field.



Select the account that's right for you.

Thank you for choosing ING U.S. Our fast and easy online accounts give you access many of ING U.S.'s retirement saving solutions. Opening your account is easy and should only take about XX minutes.

What would you like to do today?

- ☐ **Open a new account**
Description text, educational materials
- ☐ **Rollover an existing account**
An IRA where contributions are made after-tax so you may qualify for tax-free withdrawals of contributions and earnings in Retirement.



Need Help?

Contact and ING Agent

Our representatives can help you throughout the process. They are just a quick phone call away.

800-XXX-XXXX

Additional Information

[How to Roll over Quick guide](#)
[Benefits of Opening an Account](#)
[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)
[What are My Investment Options?](#)
[Help me create an asset allocation strategy](#)

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What would you like to do today?

☒ **Open a new account**

Description text, educational materials

☒ **Retirement Account**

Description text, educational materials

☐ **Investment Account**

Description text, educational materials

Next

☐ **Rollover an existing account**

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[What are My Investment Options?](#)
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☒ **Open a new account**

Description text, educational materials

Retirement Account

☒ **IRA**

Description text, educational materials

☐ **Roth IRA**

Description text, educational materials

[Back](#)

[Next](#)

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[Account Selector Tool](#)

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[What are My Investment Options?](#)

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What would you like to do today?

☒ **Open a new account**

Description text, educational materials

IRA

- ☒ All mutual funds
- ☐ Stocks, Bonds, ETFs and Mutual Funds

[Back](#)

[Continue](#)

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[Account Selector Tool](#)

Commonly Asked Questions

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[What are My Investment Options?](#)
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Option 2

- Four steps to walk the user through
- Moved right column to the bottom
- Changed layout to leave full width of page for descriptions and definition text so that we don't need def. pop-ups

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Select the Account that's right for you



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What would you like to do today?

- ☐ **Open a new account**
Description text, educational materials
- ☐ **Rollover an existing account**
Description text, educational materials

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Additional Information

[How to Roll over Quick guide](#)
[Benefits of Opening an Account](#)
[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)
[What are My Investment Options?](#)
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What would you like to do today?

☒ Open a new account

☒ **Retirement Account**
Description text.

☐ **Investment Account**
Description text.

[Next](#)

☐ **Rollover an existing account**
Description text, educational materials

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Additional Information

[How to Roll over Quick guide](#)
[Benefits of Opening an Account](#)
[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)
[What are My Investment Options?](#)
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What would you like to do today?

☒ Open a new account

Retirement Account

☒ IRA

Description text.

☐ Roth IRA

Description text.

[Back](#)

Next

☐ Rollover an existing account

Description text, educational materials

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Additional Information

[How to Roll over Quick guide](#)

[Benefits of Opening an Account](#)

[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)

[What are My Investment Options?](#)

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☒ Open a new account

IRA

- ☒ All mutual funds
- ☐ Stocks, Bonds, ETFs and Mutual Funds

[Back](#)

[Continue](#)

☐ Rollover an existing account

Description text, educational materials

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Additional Information

[How to Roll over Quick guide](#)

[Benefits of Opening an Account](#)

[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)

[What are My Investment Options?](#)

[Help me create an asset allocation strategy](#)

Option 3

This options still has the four steps and has a box appear under the field you chose with additional options but uses the original layout with the right column.

We met with Shannon again this afternoon and she said that based on the info that 'may' add in the right, if it instructional or to assist then in the process of making selections, they will require a right rail and will not want the info below. I added it back in just in case...

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What would you like to do today?

☐ **Open a new account**

Description text, educational materials

☐ **Rollover an existing account**

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Need Help?

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Additional Information

- [How to Roll over Quick guide](#)
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Commonly Asked Questions

- [What are the benefits of an IRA?](#)
- [What are My Investment Options?](#)
- [Help me create an asset allocation strategy](#)

Additional Products

If you are interested in receiving additional information on the follow products please contact an investment specialist at XXX-XXX-XXXX

- [Advisory Products](#)
- [529 Plans](#)
- [Fixed or Variable Annuities](#)

Select the Account that is Right for You



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☒ Open a new account

Description text, educational materials

☒ Retirement Account

Description text, educational materials

☐ Investment Account

Description text, educational materials

[Next](#)

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Additional Information

- How to Roll over Quick guide
- Benefits of Opening an Account
- Account Selector Tool

Commonly Asked Questions

- What are the benefits of an IRA?
- What are My Investment Options?
- Help me create an asset allocation strategy

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- 529 Plans
- Fixed or Variable Annuities

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What would you like to do today?

☒ **Open a new account**

Description text, educational materials

Retirement Account

☒ **IRA**

Description text, educational materials

☐ **Roth IRA**

Description text, educational materials

[Back](#)

[Next](#)

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Additional Information

- [How to Roll over Quick guide](#)
- [Benefits of Opening an Account](#)
- [Account Selector Tool](#)

Commonly Asked Questions

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- [What are My Investment Options?](#)
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What would you like to do today?

☒ Open a new account

Description text, educational materials

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- ☒ All mutual funds
- ☐ Stocks, Bonds, ETFs and Mutual Funds

[Back](#)

 **Continue**

☐ Rollover an existing account

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Additional Information

- [How to Roll over Quick guide](#)
- [Benefits of Opening an Account](#)
- [Account Selector Tool](#)

Commonly Asked Questions

- [What are the benefits of an IRA?](#)
- [What are My Investment Options?](#)
- [Help me create an asset allocation strategy](#)

Additional Products

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- [529 Plans](#)
- [Fixed or Variable Annuitiels](#)

Option 4:

Just ask what is absolutely needed and collect info in two steps
These are highlighted in the original wires before business asked
that more data get collected.

This option seems to make the most sense since it is more direct.

Once you click on Retirement, a box would slide down or appear
with the option that you need to provide and a continue Button

Select the Account that's right for you



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What would you like to do today?

Retirement Savings Account

- ☐ **Traditional IRA**
Description text, educational materials
- ☐ **Roth IRA**
An IRA where contributions are made after-tax so you may qualify for tax-free withdrawals of contributions and earnings in Retirement.
- ☐ **Rollover IRA**
An IRA where you can consolidate one or more 401(k) plans into one account.

[Compare Roth IRA and Traditional IRA](#)

Brokerage Account

- ☐ **Non-IRA Brokerage Account**
A taxable brokerage account which gives you the opportunity and flexibility to select from a large universe of investments, including, mutual funds, stocks, ETF's and bonds.

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Additional Information

[How to Roll over Quick guide](#)
[Benefits of Opening an Account](#)
[Account Selector Tool](#)

Commonly Asked Questions

[What are the benefits of an IRA?](#)
[What are My Investment Options?](#)
[Help me create an asset allocation strategy](#)

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What would you like to do today?

Retirement Savings Account

☒ **Traditional IRA**

Description text, educational materials

Please choose the type of funds...

☒ All mutual funds ☐ Stocks, Bonds, ETFs and Mutual Funds

 **Continue**

☐ **Roth IRA**

An IRA where contributions are made after-tax so you may qualify for tax-free withdrawals of contributions and earnings in Retirement.

☐ **Rollover IRA**

An IRA where you can consolidate one or more 401(k) plans into one account.

[Compare Roth IRA and Traditional IRA](#)

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A taxable brokerage account which gives you the opportunity and flexibility to select from a large universe of investments, including, mutual funds, stocks, ETF's and bonds.

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[Benefits of Opening an Account](#)
[Account Selector Tool](#)

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[What are the benefits of an IRA?](#)
[What are My Investment Options?](#)
[Help me create an asset allocation strategy](#)