Visual Design Specifications for Prospect Lead Project

Including:

Responsive Form Elements

[PDF](#)

[Button Container Specs](#)

Sets of text entry fields (ISIN, SSN, Tel#)

- Do NOT auto-tab out of the last field in the set.
- Do NOT auto-tab unless max character count for a field is met.
- Support error correction / editing of entries[*]
  - Do NOT auto-tab as users click or tab or shift+tab into fields where max #characters has been met. This may auto-tab them out of the field before they're ready.
  - To help with the above, always highlight entire contents of fields when users Tab or Shift+Tab into them. This facilitates users typing over / editing entries and gives blind users sense for the entire entry.

[*] Error correction - not prematurely auto-tabbing users out of a field when trying to is critical. Keyboard users will tab or shift+tab (reverse tab) to a field with an error. We also typically recommend forcing focus to the 1st field in a form with an error when validation happens on submit. So we want users to be able to avoid auto-tab in these situations.

- Auto-tabbing does NOT work on iOS devices and is a significantly disruptive experience for users. In the case of iOS devices, we replace the separate auto-tabbed fields with a single auto-formatted field:
  http://styleguide.fmr.com/components/data/autoformat.html
- For sample implementation, see Account Opening, which has the multiple variations (iOS will show the different one indicated above):
  https://toajenkins.fmr.com/job/AONG_REF_UI/ws/view/vobs_accountopening/AONG/ref_ui/dist/page_personalinfo.html#142056016...

Input with label

Standard

Name
- First, Middle, Last
- First, Last

Phone

Zip Code

Responsive Pattern Library:
- [input-name](#)
- [input-single-field](#)

Select with label

Note: on mobile devices select options longer than 36 characters are cut off, so best to use a list of radio buttons, if only one answer is appropriate, or checkboxes, if multiple answers are possible.

Input type="checkbox" with label

Responsive Pattern Library: checkbox

Input type="radio" with label

Responsive Pattern Libary: radio

Accessibility Guidelines

- Be sure that each form element is properly paired (label has a *for* attribute that corresponds with the form element's *id*, and that the ID's are unique).
- For grouped inputs (Name, SSN, phone, all radio groups), wrap the cluster of inputs (with their individual labels) with a single surrounding div, and give that div either role="group" or role="radiogroup" as appropriate, along with an ID. Alternately, use <fieldset>. For the input group (or fieldset) <label>, have the for property refer to the group/fieldset's ID.
- Pair an aria-describedby property on an input with the corresponding error message and any hint text, in that order. Example: <input type="text" aria-describedby="[error div ID] [hint text div ID]">
- When an input is in an error state, have aria-invalid="true" (if the associated inline error alert div is visible).
- Add aria-required="true" to any required input/select, unless all elements on the page are required.
- For a radio group with no default value, add "required" to the end of the radio group's <label> with off-screen text as appropriate (best to use CSS ::after).
- Error alert divs should have role="alert", along with aria-hidden="true" in the hidden state, and aria-hidden="false" in the visible state.
- For content validation triggered by page-level submit, put focus on the first form element in error state.

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX):

TABLET VIEW - MIN-WIDTH: 38.68EM, MAX-WIDTH: 66.067EM (~990PX), SAME AS DESKTOP VIEW — ABOVE 990PX

Top section (form field specs)

19% 19% 19%

First
12px regular #666666
Middle (optional)   Last

12px bold #000000   16   9

Your Name   Sam   16   33   16   Thomas

18

First   Last
9

Your Name   16   33   16

25%   25%

100%

25%   16

City   max-width:370px

ZIP Code   Width: 90px (60rem)

Phone   Width: 45px   8   8   Width: 45px   —   Width: 55px

18   11px #666

State   Select Your State   font-size: 14px #666   ⬍   height: 33px

max-width: 330px (22rem)

Form Title —H1

Lede Paragraph

18

This is some introduction text that tells the user about the entire form. In the case that the text exceeds the length of the center well, it should wrap to multiple lines.

18

⚠ **Error message**

8   18
8

* Indicates required field —12px

18

Section Header — H3

18

Standard Paragraph

This is some introduction text that tells the user about this category of the form. In the case that the text exceeds the length of the center well, it should wrap to multiple lines.

18

12px, Reg, #666666

First   Middle (optional)   Last

12px, Bold   9

Name   16   Text   33   16   Text   16   Text — Form Default, Middle-aligned to field

18

Social Security Number   —   —   8Must be 9 digits

6   6

⚠ An inline error message

ERROR STATE: If the form control in error is a text box or drop-down list/selector, the border of the box changes to red (#CC0000)

Default Font: Helvetica Regular 15px #000000 (unless noted)

18

Phone   Width: 45px   8   8   Width: 45px   —   Width: 55px

Not Required (optional)   Text   8%   16Must be 10% or more

Amount $8   Width: 90px (60rem)

33

18

Buttons and Boxes

18

Middle-aligned group label to first button

Group Label   ○8 Field Label A   Form Default, Middle-aligned to button

18

15○ Field Label B
Multi-line

33

Middle-aligned

first line of
group label
to first button

Group Label

Multi-Line

◯ Field Label A   ◯ Field Label B

❗ An inline error message

☐ Checkbox Label A

☐ Checkbox Label B

Secondary Label A

◯ Field Label A

◯ Field Label B

Secondary Label B

◯ Field Label A

◯ Field Label B

☐ Checkbox Label C

Secondary Label A

Field Label A   Field Label B

Standard Paragraph

When there is a single question or statement that elicits a simple Yes/No response, or when we are asking users to provide input outside the form field, or when the user is providing a single response to a question or statement, then Standard Paragraph should be used.

◯ Field Label A

◯ Field Label B

Messaging

Form Default, Middle-aligned to dropdown

Form Label | Select ▾ | [   ]

❗ An inline error message

❗ An inline error message

Form Label   [   ]

Supplemental text below a form element.

Form Label   [   ]

❗ An inline error message

Supplemental text below a form element.

Exit | Save - - - - - - - - - - - - - - - **Back**   **Continue**   Textual "tip"

15px, Reg

Elements are middle-aligned

AS OF 2/5/2014

DESKTOP VIEW - ABOVE 990PX

Top section based on Content Article Body. Refer to that standard for details.

Form Title —H1

18

Lede Paragraph

This is some introduction text that tells the user about the entire form. In the case that the text exceeds the length of the center well, it should wrap to multiple lines.

Place into Tridion template in many cases with the right rail.

⊘ Error message

Indicates required field —12px

18

16 **Section Header** — H3

18

Standard Paragraph

This is some introduction text that tells the user about this category of the form. In the case that the text exceeds the length of the center well, it should wrap to multiple lines.

18

12px, Bold

First 9

Middle (optional)

Last

12px, Reg, #666666

Name 16   Text   33   16   Text   16   Text — Form Default, Middle-aligned to field

18

Social Security Number   ▢ – ▢ – ▢   8 Must be 9 digits

⊘ An inline error message

ERROR STATE: If the form control in error is a text box or drop-down list/selector, the border of the box changes to red (#CC0000)

Default Font: Helvetica Regular 15px #000000 (unless noted)

Phone   ▢ – ▢ – ▢

Not Required (optional)   Text   8% 16 Must be 10% or more

State   Select Your State   font-size: 14px #666   ⇕ | height: 33px

max-width: 330px (22rem)

Sign-up Widget

FRESH SPECS, as of 2014-12-02: [PDF](PDF)

OLD SPECS: [PDF](PDF)

[Responsive Prototype, main well](#) - not to spec

[Responsive Prototype, right rail](#) - not to spec

Component may contain:

- Two regions: a Viewpoints article feed, and an optional lead capture form. At 1140px desktop view, Viewpoints article feed occupies 67% of the parent container, and lead capture form occupies 33% of parent container.
- The Viewpoints article feed uses a DDC Query CT to component-link article headlines and descriptions into the region. Also supports a separate rich text field for "See all…" link below the feed.
- DDC Query CT will have specific CSS stylings when used in the Homepage Page Template.
- The lead capture form field includes a headline, multiple form input fields, and a call to action button.
- Component container supports a full-span background color or texture.

Other Details:

- Viewpoints article feed supports various display treatments within its dedicated region.
  - 1 over 1: headlines and descriptions span 100% of available region
  - 2 over 2: headlines and descriptions span two 50% columns within available region
  - 3 over 3: (only when the lead capture form is not included in component) Viewpoints article feed region spans 100% of the parent container. Headlines and descriptions span three 33% columns.

Sign-up Widget Within Main Content Well

[Sample Responsive Prototype](#) - *best viewed in a webkit browser*
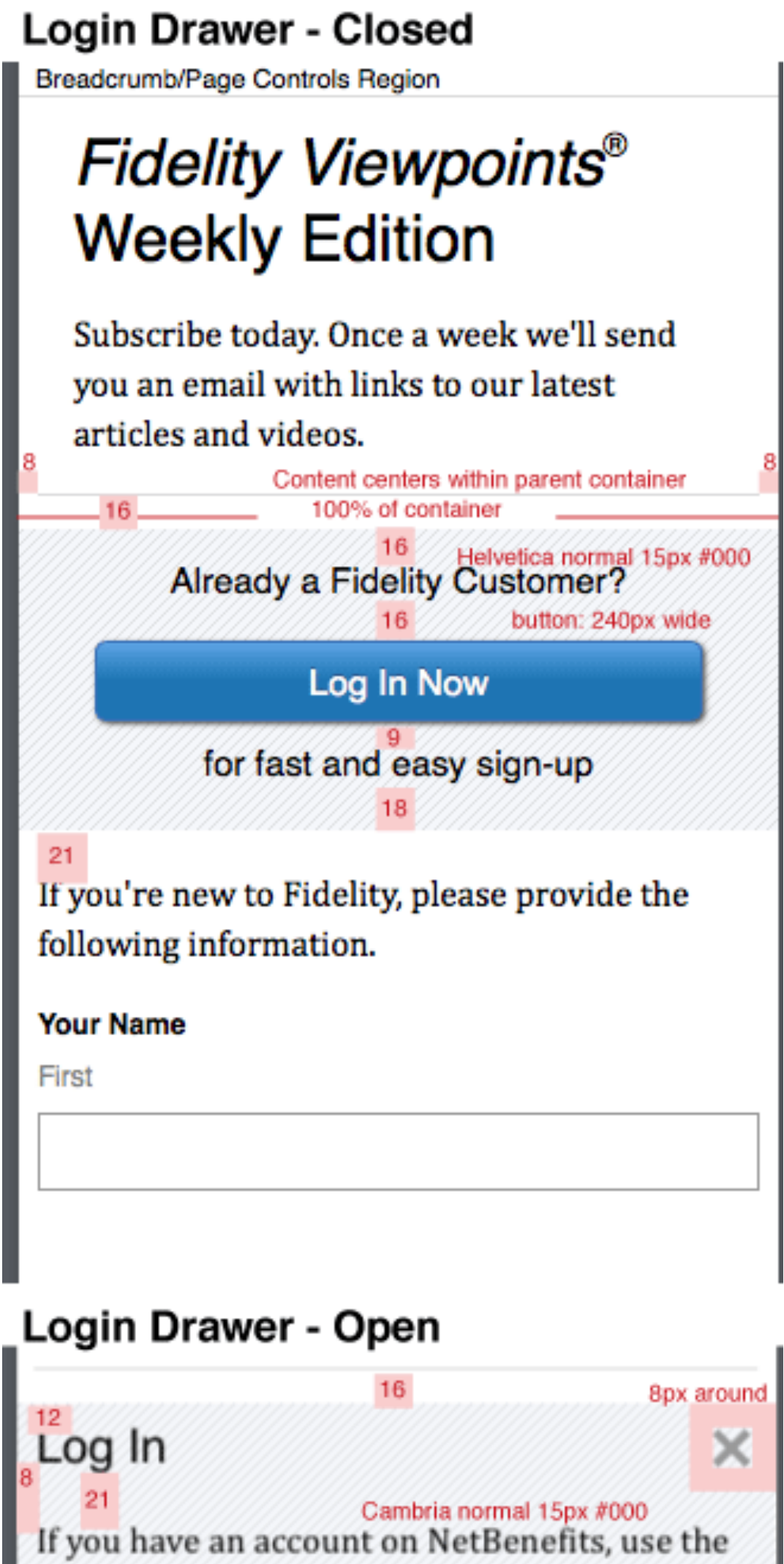
Sign-up Widget Within Right Rail

Sign-up Widget fills 100% width of the parent container, within the Tridion Right Rail template, with the spacing shown of 16px on the left and right.

~~The submit button is centered and has a width of 240px for viewports of max-width 480px.~~

Login Drawer

[PDF](#)

[Responsive Prototype](#) - not to spec

When the "Log In Now" button is clicked, the "Closed" contents hide, and the "Open" contents appear. When the X is clicked, the reverse happens.

When "Log In" is selected:

1. if the login is successful, their info prepopulates the fields, and the login drawer disappears. All are editable, except Your Name.
2. if the login is not successful, see the error message styling. NOTE: For form level errors, if it's possible add to the error message a link, "Need Help Logging In" that takes the user to that page.

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX)

Login Drawer - Closed

Breadcrumb/Page Controls Region

Fidelity Viewpoints®
Weekly Edition

Subscribe today. Once a week we'll send you an email with links to our latest articles and videos.

8   Content centers within parent container   8
16   100% of container

16   Helvetica normal 15px #000
Already a Fidelity Customer?
16   button: 240px wide

Log In Now

9
for fast and easy sign-up
18

21
If you're new to Fidelity, please provide the following information.

Your Name
First

Login Drawer - Open

16   8px around
12
Log In   ✕
8
21   Cambria normal 15px #000
If you have an account on NetBenefits, use the

same username and password.

Username

Password

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Your Name

First

Login Drawer - Labels

Log In   ✕

If you have an account on NetBenefits, use the same username and password.

Username

Username

Password

••••••••

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Your Name

First

Login Drawer - Errors

❗ **Form level error message**

Log In   ✕

If you have an account on NetBenefits, use the same username and password.

border: 1px solid #cc0000

Username

6

⚠ Field-level error message.

31

Password

6

⚠ Field-level error message.

31

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Your Name

SMALL TABLET VIEW - SAME AS DESKTOP VIEW

Login Drawer - Closed

Breadcrumb/Page Controls Region

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Subscribe today. Once a week we'll send you an email with links to our latest articles and videos.

16 ———————— 100% of container ————————

Content centers within parent container

16

Already a Fidelity Customer?   Helvetica normal 15px #000

16

Log In Now   button: 240px wide

9

for fast and easy sign-up

18

21

If you're new to Fidelity, please provide the following information.

Your Name

First

Login Drawer - Open

16

12

8px around

Log In

8

×

21

If you have an account on NetBenefits, use the same username and password.

form: remains 270px wide, centered within parent container, at all viewport widths

Cambria normal 15px #000

24

Username
33

28

Password

28

Log In

button: 240px wide

24

Fidelity Members Log In Here

Helvetica normal 15px

28

If you're new to Fidelity, please provide the following information.

Your Name

First

Login Drawer - Labels

Log In ✕

If you have an account on NetBenefits, use the same username and password.

10px bold Helvetica #565656 Username
9
4

Username 15px normal Helvetica #000

9

Password
4

••••••••

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Login Drawer - Errors

16

8 ❗ Form level error message NOTE: For form level errors, if it's possible add to the error message a link, "Need Help Logging In" that takes the user to that page.

12

Log In ✕

If you have an account on NetBenefits, use the same username and password.

border: 1px solid #cc0000

Username

6
❗ Field-level error message.
31

Password

6
❗ Field-level error message.
31

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Your Name

First

TABLET VIEW - SAME AS DESKTOP VIEW

Login Drawer - Closed

16 ———— 100% of container ————

Content centers within parent container

16

Already a Fidelity Customer?   Helvetica normal 15px #000

16

Log In Now   button: 240px wide

9

for fast and easy sign-up

18

21

If you're new to Fidelity, please provide the following information.

First   Last

Your Name

Login Drawer - Open

16   8px around

12

Log In   ✕

8

21

If you have an account on NetBenefits, use the same username and password.   Cambria normal 15px #000

form: remains 270px wide, centered within parent container,
at all viewport widths

24

Username 15px normal Helvetica #000   33

28

Password

28

Log In   button: 240px wide

24

Fidelity Members Log In Here   Helvetica normal 15px

28

If you're new to Fidelity, please provide the following information.

First   Last

Your Name

Login Drawer - Labels

Log In   ✕

If you have an account on NetBenefits, use the same username and password.

10px bold Helvetica #565656   Username
9
4

Username

9

Password
4

•••••••••

Log In

Fidelity Members Log In Here

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First   Last

Your Name

Login Drawer - Errors

18

8 ⊘ Form level error message   NOTE: For form level errors, if it's possible add to the error message a link,
                                    "Need Help Logging In" that takes the user to that page.

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If you have an account on NetBenefits, use the same username and password.

                                                    border: 1px solid #cc0000

Username

6 ⊘ Field-level error message.
31

Password

6 ⊘ Field-level error message.
                        31

DESKTOP VIEW - ABOVE 990PX

Login Drawer - Closed

Breadcrumb/Page Controls Region

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16 — 100% of container

Content centers within parent container

16

Already a Fidelity Customer?   Helvetica normal 15px #000

16

Log In Now   button: 240px wide

9

for fast and easy sign-up

18

21

If you're new to Fidelity, please provide the following information.

background-color:#f5f7fb with a repeating transparent diagonal
background:rgba(245,247,251,1) url('diagonal30.png') 0 0 repeat;
Recommend use of rgba (with hex backup), as there may be future use of overlap with an image, or changing color of background.

When the "Log In Now" button is clicked, the "Closed" contents hide, and the "Open" contents appear.

When the X is clicked, the reverse happens.

When "Log In" is selected:
  a) if the login is successful, their info prepopulates the fields, and the login drawer disappears. All are editable, except Your Name.
  b) if the login is not successful, see the error message styling. The error messages should direct the user to the Need Help Logging In?

	First	Last
Your Name		

Questions?

800-343-3548

Chat with a representative.

Find an Investor Center.

Login Drawer - Open

Breadcrumb/Page Controls Region

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16

12

Log In

8

8px around

21

If you have an account on NetBenefits, use the same username and password.   Cambria normal 15px #000

10px bold Helvetica #565656   Username   24

Username 15px normal Helvetica #000   33

form: remains 270px wide, centered within parent container, at all viewport widths

9

Password   28
4

••••••••

28

Log In   button: 240px wide

24

Fidelity Members Log In Here   Helvetica normal 15px

28

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Your Name		

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Log In

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border: 1px solid #cc0000

Username

6
🛑 Field-level error message.
31

Password

6
🛑 Field-level error message.
31

Log In

Fidelity Members Log In Here

If you're new to Fidelity, please provide the following information.

Preview Component

[PDF](#)

[Responsive Prototype](#) - not to spec

Cover of brochure image is 40% of parent container, floated right, for viewports wider than 400px. Below 400px, the image centers within the parent container and has a max-width of 290px, or a max-height of 214px, but these dimensions may differ, depending on the actual cover. Use design discretion.

Although my prototype is two pages, the actual implementation would use JavaScript or CSS :target state to display the preview. The desired behavior is that the preview slides open and closed, within the component. Please have the developer work with design to refine the component.

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX)

financial goals. [TBD]

16 ### Our New Retirement Guide [TBD]

12

16

viewports < 400px: image centers, max-width:290px, although that may vary depending on the image. Designer discretion.

The Sourcebook

A guide to wealth planning products and services for Fidelity's clients

UPDATE 2014-12-16 ᴀ Fidelity

Change this to Cambria Bold, not italic

p, strong, italic - Cambria bold italic 15px -- link styling

6

Preview This Guide

16

16 The entirety of the content is presented as FPO. Get our latest thinking on retirement planning. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

16

SEE TABLET AND DESKTOP FOR STYLES

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices nibh vitae erat mattis, at fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget id odio. [TBD]

12

For the complete guide, please submit the 16 *information below. [TBD]*

16

Personal Information

Your Name

PHONE VIEW - *OPEN* — MAX-WIDTH: 38.67EM (~580PX)

16

12

16   p, italic - Cambria normal italic 15px -- link styling   16

16

The Three A's of Saving Successfully for Retirement

FROM THE INTRODUCTION BY KATHLEEN MURPHY, PRESIDENT, PERSONAL INVESTING FIDELITY INVESTMENTS

The entirety of the content is presented as FPO.

SEE TABLET AND DESKTOP FOR STYLES

What if your life changed in an instant? One spouse outliving another. A looming retirement with a plan that falls short of its potential? We've all heard the stories. It's time to talk about how to be prepared for them. Our solution: The three A's of saving successfully for retirement: the amount you save, the accounts you save in, and your asset mix.

This e-book offers key lessons on how to get a handle on your long-term financial goals, and how to pursue those goals in a thoughtful way. Taking control of your financial life now is the best way to help keep those "if necessary" moments at bay.

Nobody deliberately plans not to save enough or invest properly; life just gets in the way. Children are born. Homes are purchased. College educations get paid. Emergencies and deaths happen unexpectedly. Don't let inertia, intimidation or lack of confidence prevent you from living the life you want to live—and deserve. You have more control over the outcome than you may think.

President, Personal Investing Fidelity Investments

Close the Preview

12

For the complete guide, please submit the information below. [TBD]

16

Personal Information

Your Name

First

SMALL TABLET VIEW - SAME AS DESKTOP VIEW

8

18 h3.promo-group-horizontal-promo h3

16 **Our New Retirement Guide [TBD]**

12

image top-aligns with first line of paragraph

The entirety of the content is presented as FPO. our latest thinking on retirement planning. Lor ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

viewports > 400px: image is 40% of parent container, floats right

16

16

The Sourcebook

UPDATE 2014-12-16

p (style should match the p style within .promo-group-horizontal-promo)

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices vitae erat mattis, at fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget odio. [TBD]

Change this to Cambria Bold, not italic

Preview This Guide

p, strong, italic - Cambria bold italic 15px -- link styling

12

For the complete guide, please submit the information below. [TBD]

16

p (style should match the p style within .promo-group-horizontal-promo — but <em>, so italic)

Personal Information

Your Name

First

Last

SMALL TABLET VIEW - *OPEN* - SAME AS DESKTOP VIEW

Our New Retirement Guide [TBD]

The entirety of the content is presented as FPO. Get our latest thinking on retirement planning. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis blandit finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices aliquet posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices nibh vitae erat mattis, at porta fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget id odio. [TBD]

Close the Preview

The Three A's of Saving Successfully for Retirement

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President, Personal Investing Fidelity Investments

Close the Preview

Our New Retirement Guide [TBD]

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Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accusan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Done ultrices nibh vitae erat mattis, at fringilla ipsum tristique. Sed eu eu mauris lobortis dignissim eget id odio. [TBD]

The Sourcebook

A guide to wealth planning products and services for Fidelity's clients

Turn here:
Fidelity

Preview This Guide

For the complete guide, please submit the information below. [TBD]
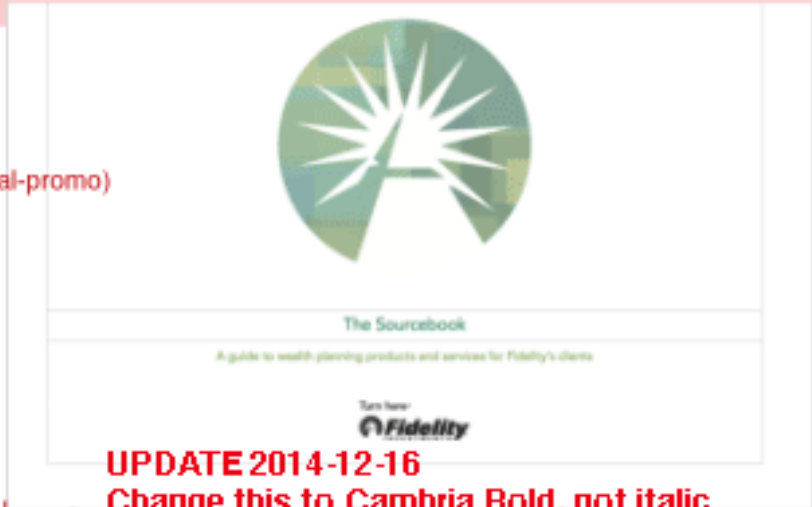
Personal Information

First   Last

Your Name

Email

TABLET VIEW - OPEN - SAME AS DESKTOP VIEW

h3.promo-group-horizontal-promo h3

Our New Retirement Guide [TBD]

16

12

image top-aligns with first line of paragraph

The entirety of the content is presented as FPO. Get our latest thinking on retirement planning. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

16

viewports > 400px: image is 40% of parent container, floats right

16

p (style should match the p style within .promo-group-horizontal-promo)

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices nibh vitae erat mattis, at fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget id odio. [TBD]

The Sourcebook

A guide to wealth planning products and services for Fidelity's clients

O Fidelity

6

16

28   12

Close the Preview   p, italic - Cambria normal italic 15px -- link styling

16

21

The Three A's of Saving Successfully for Retirement

16   helvetica bold 15px #333

FROM THE INTRODUCTION BY KATHLEEN MURPHY,
PRESIDENT, PERSONAL INVESTING FIDELITY INVESTMENTS   helvetica bold 9px #333

background: #f4f4f4;
border-bottom: 1px solid #ddd;
border-top: 1px solid #ddd;
color: #333;

16

The entirety of the content is presented as FPO.

paragraph color #333

28

What if your life changed in an instant? One spouse outliving another. A looming retirement with a plan that falls short of its potential? We've all heard the stories. It's time to talk about how to be prepared for them. Our solution: The three A's of saving successfully for retirement: the amount you save, the accounts you save in, and your asset mix.

This e-book offers key lessons on how to get a handle on your long-term financial goals, and how to pursue those goals in a thoughtful way. Taking control of your financial life now is the best way to help keep those "if necessary" moments at bay.

Nobody deliberately plans not to save enough or invest properly; life just gets in the way. Children are born. Homes are purchased. College educations get paid. Emergencies and deaths happen unexpectedly. Don't let inertia, intimidation or lack of confidence prevent you from living the life you want to live—and deserve. You have more control over the outcome than you may think.

21

4

p, small - Cambria normal 12px

16 President, Personal Investing Fidelity Investments

21

Close the Preview   p, italic - Cambria normal italic 15px -- link styling

16

12

For the complete guide, please submit the information below. [TBD]

16   p (style should match the p style within .promo-group-horizontal-promo — but <em>, so italic)

Personal Information

DESKTOP VIEW - ABOVE 990PX

Our New Retirement Guide [TBD]

The entirety of the content is presented as FPO. Get our latest thinking on retirement planning. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

The Sourcebook

A guide to wealth planning products and services for Fidelity's clients

Turn here:
Fidelity

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices nibh vitae erat mattis, at fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget id odio. [TBD]

Preview This Guide

For the complete guide, please submit the information below. [TBD]

Personal Information

	First	Last
Your Name		

Email	

DESKTOP VIEW - *OPEN* - ABOVE 990PX

Our New Retirement Guide [TBD]

image top-aligns with first line of paragraph

The entirety of the content is presented as FPO. Get our latest thinking on retirement planning. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras augue diam, ultricies ac nisl quis, feugiat rutrum elit. In iaculis nisi quis finibus tincidunt. Praesent ex felis, venenatis ut orci ut, dapibus blandit urna.

viewports > 400px: image is 40% of parent container, floats right

p (style should match the p style within .promo-group-horizontal-promo)

Nulla ut risus scelerisque, aliquet urna a, ullamcorper nisi. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Proin porta faucibus sem sit amet accumsan. Aenean orci lacus, ultrices a arcu et, aliquet convallis mauris. Donec ultrices nibh vitae erat mattis, at fringilla ipsum tristique. Sed eu leo eu mauris lobortis dignissim eget id odio. [TBD]

The Sourcebook

A guide to wealth planning products and services for Fidelity's clients

Turn here

🔷 Fidelity

Close the Preview

p, italic - Cambria normal italic 15px -- link styling

The Three A's of Saving Successfully for Retirement

helvetica bold 15px #333

FROM THE INTRODUCTION BY KATHLEEN MURPHY,
PRESIDENT, PERSONAL INVESTING FIDELITY INVESTMENTS

helvetica bold 9px #333

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border-bottom: 1px solid #ddd;
border-top: 1px solid #ddd;
color: #333;

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paragraph color #333

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This e-book offers key lessons on how to get a handle on your long-term financial goals in a thoughtful way. Taking control of your financial life now is the best way to help keep th y.

Nobody deliberately plans not to save enough or invest properly; life just gets in the wa purchased. College educations get paid. Emergencies and deaths happen unexpectedly. lack of confidence prevent you from living the life you want to live—and deserve. You have than you may think.

189 height

width is fluid; depends on image

If a signature is used, use a transparent png, with the background knocked-out
sizing will vary depending on the signature.
If a portrait is used, see specs at right.

President, Personal Investing Fideli

Close the Preview

President, Personal Investing Fidelity Investments

Close the Preview

p, italic - Cambria normal italic 15px -- link styling

For the complete guide, please submit the information below. [TBD]

p (style should match the p style within .promo-group-horizontal-promo — but <em>, so italic)

Personal Information

Confirmation Page

[PDF](#)

[Responsive Prototype](#) - not to spec

Within class="content-body--top"

h1 - class="content-body--top-heading popin-wrapper--header"

lede paragraph - class="content-body--top-lede"

Within article id="fmr-bodycontent-component" data-fmrtoctcmid="tcm:526-96382" class="content-body--article"

paragraph

unordered list, with list items

Within class="promo-group-horizontal-promo"

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX)

Fidelity

Home » Investment Products » Retirement & IRAs » Small Business »

`content-body--top`

Thank You [TBD]
`h1 class="content-body--top-heading popin-wrapper--header"`

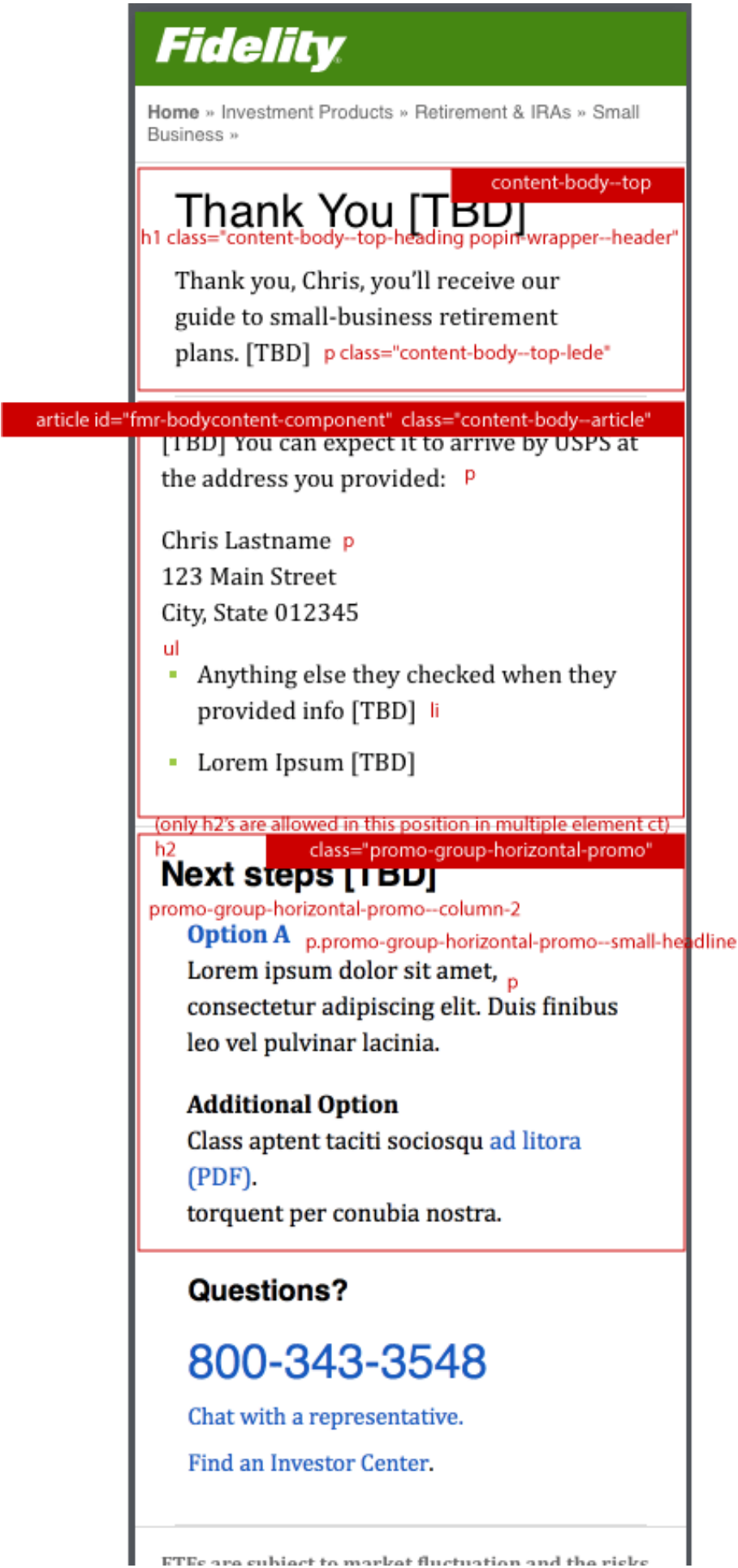Thank you, Chris, you'll receive our guide to small-business retirement plans. [TBD]   `p class="content-body--top-lede"`

`article id="fmr-bodycontent-component" class="content-body--article"`

[TBD] You can expect it to arrive by USPS at the address you provided: `p`

Chris Lastname   `p`
123 Main Street
City, State 012345

`ul`
- Anything else they checked when they provided info [TBD]   `li`
- Lorem Ipsum [TBD]

(only h2's are allowed in this position in multiple element ct)

`h2`   `class="promo-group-horizontal-promo"`

Next steps [TBD]

`promo-group-horizontal-promo--column-2`

Option A   `p.promo-group-horizontal-promo--small-headline`
Lorem ipsum dolor sit amet,   `p`
consectetur adipiscing elit. Duis finibus leo vel pulvinar lacinia.

Additional Option
Class aptent taciti sociosqu ad litora (PDF).
torquent per conubia nostra.

Questions?

800-343-3548

Chat with a representative.

Find an Investor Center.

ETFs are subject to market fluctuation and the risks

TABLET VIEW - MIN-WIDTH: 38.68EM, MAX-WIDTH: 66.067EM (~990PX), SAME AS DESKTOP VIEW — ABOVE 990PX

Thank You [TBD]
h1 class="content-body--top-heading popin-wrapper--header"

content-body--top

Thank you, Chris, you'll receive our guide to small-business retirement plans. [TBD]
p class="content-body--top-lede"

article id="fmr-bodycontent-component" class="content-body--article"

[TBD] You can expect it to arrive by USPS at the address you provided:
p

Chris Lastname *p*
123 Main Street
City, State 012345

ul
- Anything else they checked when they provided info [TBD] *li*

- Lorem Ipsum [TBD]

Next steps [TBD]
h2 (only h2's are allowed in this position in multiple element ct)

class="promo-group-horizontal-promo"

Option A *p.promo-group-horizontal-promo--small-headline*

promo-group-horizontal-promo--column-2

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis finibus leo vel pulvinar lacinia. *p*

Additional Option
Class aptent taciti sociosqu ad litora (PDF).
torquent per conubia nostra.

Questions?

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Find an Investor Center.

ETFs are subject to market fluctuation and the risks of their underlying investments. ETFs are subject to management fees and other

DESKTOP VIEW - ABOVE 990PX

Fidelity

Thank You [TBD]
h1 class="content-body--top-heading popin-wrapper--header"

content-body--top

Thank you, Chris, you'll receive our guide to small-business retirement plans. [TBD] p class="content-body--top-lede"

article id="fmr-bodycontent-component" class="content-body--article"

[TBD] You can expect it to arrive by USPS at the address you provided: p

Chris Lastname P
123 Main Street
City, State 012345

ul

li

- Anything else they checked when they provided info [TBD]
- Lorem Ipsum [TBD]

Next steps [TBD]
h2 (only h2's are allowed in this position in multiple element ct)

class="promo-group-horizontal-promo"

promo-group-horizontal-promo--column-2

Option A

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis finibus leo vel pulvinar lacinia.

Additional Option p.promo-group-horizontal-promo--small-headline

Class aptent taciti sociosqu ad litora (PDF). p
torquent per conubia nostra.

ETFs are subject to market fluctuation and the risks of their underlying investments. ETFs are subject to management fees and other expenses. Unlike mutual funds, ETF shares are bought and sold at market price, which may be higher or lower than their NAV, and are not individually redeemed from the fund.

1. There is no cost to open and no annual fee for Fidelity's Traditional, Roth, SEP, and Rollover IRAs. A $50 account close out fee may apply. Fund investments held in your account may be subject to management, low balance and short term trading fees, as described in the offering materials. For all securities, see the Fidelity commission schedule for trading commission and transaction fee details.

2. $7.95 commission applies to online U.S. equity trades in a Fidelity account with a minimum opening balance of $2,500 for Fidelity Brokerage Services LLC retail clients. Sell orders are subject to an activity assessment fee (of between $0.01 to $0.03 per $1000 of principal). Other conditions may apply. See Fidelity.com/commissions for details.

The initial customer ratings and reviews for this product (those dated before 3/18/2013) were provided to Fidelity through an email solicitation for feedback on the product. All ratings and reviews are provided to Fidelity on a voluntarily basis and are screened in accordance with the guidelines set forth in our Customer Ratings and Reviews Terms of UseOpens in a new window.. For additional information on which ratings and reviews may be posted, please refer to our Customer Ratings and Review Terms of Use. Featured Reviews have been selected based on subjective criteria and reviewed by Fidelity Investments. The average rating is determined by calculating the mathematical average of all ratings that are approved for posting per the Customer Ratings and Reviews Terms of use and does not include any ratings that did not meet the guidelines and were therefore not posted. Ratings and reviews are added continuously to the website (after a delay for screening against guidelines) and average ratings are updated dynamically as reviews are added or removed.

The ratings and experience of customers may not be representative of the experiences of all customers or investors and is not indicative of future success. The accuracy of information included in the customer ratings and reviews cannot be guaranteed by Fidelity Investments. Customers who post ratings may be responsible for disclosing whether they have a financial interest or conflict in submitting a rating and review.

Please contact a Fidelity representative if you have additional questions or concerns about the ratings and reviews posted here.

Questions?

800-343-3548

Chat with a representative.

Find an Investor Center.

Download Component

[PDF](#)

[Responsive Prototype, 1](#), [Responsive Prototype, 2](#) - not to spec

When a user arrives on this page, there is the option to Log In Now, which would hide the Personal Info form area.

On arrival to this page, the button for "Review the Customer Agreement (PDF)" is blue, and the "I Agree" button is disabled.

Once the user clicks that button, which opens the customer agreement PDF in another window/tab, the button becomes secondary (grey), and the "I Agree" button becomes enabled and becomes primary (blue).

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX)

Already a Fidelity Customer?

Log In Now

for fast and easy sign-up

If logged in, hide the Personal Information section.

Personal Information

Your Name

First

Last

Email   see specs elsewhere. this area is not to spec.

23

button: 292 px

Review the Customer Agreement (PDF)

9

Please review the printable 529 Fact Kit Customer Agreement, and other supplemental legal documents. Once you have read the terms, the "I Agree" button below 16 will be enabled. These documents are presented in a pop-up window. If you are unable to access or view any of these documents, please call 800-544-1262 to have copies mailed to you at no additional charge.

16   style as currently in production

24 Selecting the I Agree button below signifies that you acknowledge that you have been provided, have read, understood, and agree to be bound by 8 the current terms of, and as may be amended 16 from time to time, the documents above in electronic format including the information and provisions set forth in this account application. This consent applies only to this new account 8 process and the delivery of the 529 Fact Kit, Customer Agreement, and other supplemental legal documents.   style as currently in production

16

I Agree

Cancel

Questions?

Account Application

Already a Fidelity Customer?

Log In Now

for fast and easy sign-up

If logged in, hide the Personal Information section.

Personal Information

Your Name

First

Last

see specs elsewhere. this area is not to spec.

Email

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16   style as currently in production

I Agree

Cancel

Questions?

TABLET VIEW - MIN-WIDTH: 38.68EM, MAX-WIDTH: 66.067EM (~990PX), SAME AS DESKTOP VIEW — ABOVE 990PX

Plan Fact Kit and Account Application

Already a Fidelity Customer?

Log In Now

for fast and easy sign-up

Personal Information

see specs elsewhere. this area is not to spec.

	First	Last
Your Name		

Email

23

Review the Customer Agreement (PDF)   button: 292 px

9

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16   16   style as currently in production   16

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8
16   style as currently in production   8

Cancel   I Agree

Questions?

DESKTOP VIEW - ABOVE 990PX

Fact Kit and Account Application

Chat with a representative.

Find an Investor Center.

Already a Fidelity Customer?

Log In Now

for fast and easy sign-up

If logged in, hide the Personal Information section.

Personal Information

First

Last

Your Name

see specs elsewhere. this area is not to spec.

Email

23

Review the Customer Agreement (PDF)   button: 292 px

9

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16   16

16

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8   other supplemental legal documents.   style as currently in production   8

16

Cancel   I Agree

Address Clarification

When a user submits their address, their entry is checked against USPS records. If there is an issue, this clarification would appear and hide the address fields.

If the user chooses "Use a different address" the address fields would appear and they could enter new data.

The address appears all in one line for viewports above 780px. Below 780px, each line breaks to a separate line.

PHONE VIEW — MAX-WIDTH: 38.67EM (~580PX)

the highlighted items below.

Your Name

First

see specs elsewhere. this area is not to spec.

Last

Email

⊗ Invalid email address. Please edit your entry.

16

16   Same as regular message styling,
16   but addition of radio list.

⚠ The address entered does not match USPS records. Please select an option.

18

○ Use Suggested Address:
433 Waldgrave Street,
Chestnut Hill, MA   viewport < 780px
02467   each address line
                            breaks to a new line

18

○ Use Submitted Address:
433 Waldgrave Building,
Chestnut Hill, MA
02467

18

○ Use a Different Address   16

18

18

SMALL TABLET VIEW

There is a problem with the information entered. Please review the highlighted items below.

Your Name

First

see specs elsewhere. this area is not to spec.

16

Last

Email

Invalid email address. Please edit your entry.

Same as regular message styling, but addition of radio list.

16

16

⚠ **The address entered does not match USPS records. Please select an option.**

18

⊙ **Use Suggested Address:**
433 Waldgrave Street,
Chestnut Hill, MA
02467

viewport < 780px
each address line
breaks to a new line

18

⊙ **Use Submitted Address:**
433 Waldgrave Building,
Chestnut Hill, MA
02467

18

⊙ **Use a Different Address**

16

18   18

8   8

16

Submit

Cancel

TABLET VIEW - MIN-WIDTH: 38.68EM, MAX-WIDTH: 66.067EM (~990PX), SAME AS DESKTOP VIEW — ABOVE 990PX

Personal Information

Tell us where to send the information you requested.

16

⊖ There is a problem with the information entered. Please review the highlighted items below.

First   Last

Your Name

Email

⊖ Invalid email address. Please edit your entry.

16

16

Same as regular message styling,
but addition of radio list.

⚠ The address entered does not match USPS records. Please select an option.

18

○ **Use Suggested Address:**

433 Waldgrave Street,
Chestnut Hill, MA
02467

viewport < 780px
each address line
breaks to a new line

18

○ **Use Submitted Address:**

433 Waldgrave Building,
Chestnut Hill, MA
02467

18

○ **Use a Different Address**

18   18

16   16

8   8

16

DESKTOP VIEW - ABOVE 990PX

Personal Information

Tell us where to send the information you requested.

16 ⊖ There is a problem with the information entered. Please review the highlighted items below.

	First	Last
Your Name		

Email

⊖ Invalid email address. Please edit your entry.

16
16

Same as regular message styling, but addition of radio list.

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18
○ Use Suggested Address:
433 Waldgrave Street, Chestnut Hill, MA 02467

18
○ Use Submitted Address:
433 Waldgrave Building, Chestnut Hill, MA 02467

18
○ Use a Different Address

18   16

18

Phone [ ] – [ ] – [ ]

8   16   8

Cancel   Submit

Loading Indicator

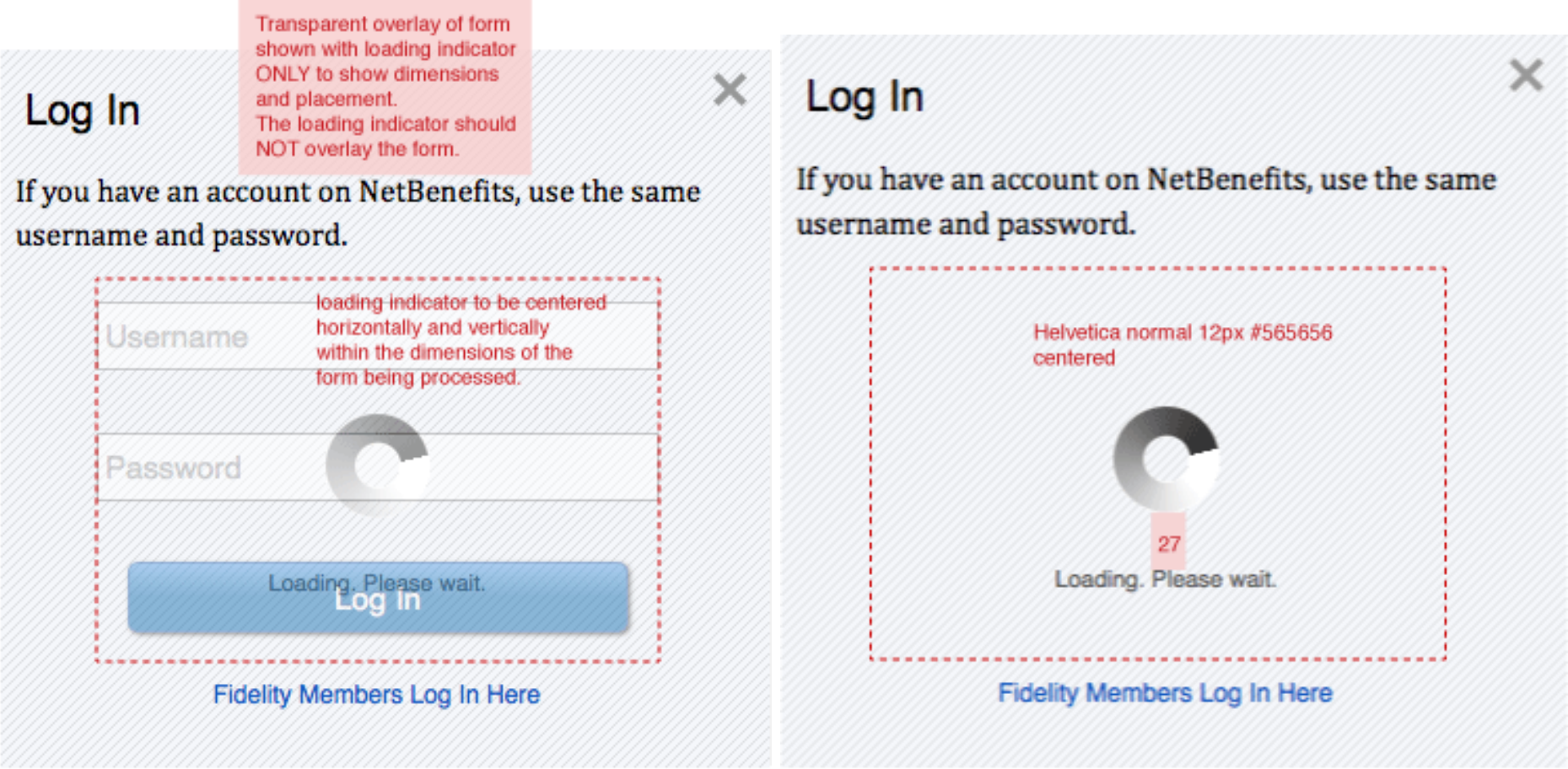[Responsive Prototype](#) - use webkit, not debugged for IE/FF

The idea is that the dimensions where the form were stay static, and the loading indicator centers within that space.

Just as the login form is a consistent size across all viewport sizes, the loading indicator would be, as well. (For the Peek pages, use the dimensions of the form at the particular viewport, and center the loading indicator within that area, horizontally and vertically.)

The homepage will need, at a minimum, a new loading indicator gif, as this image's edge isn't clean enough for use on their dark background. I've reached out to the creative director to locate a new file. There is a possibility that the homepage team will want to implement something entirely different.

One item to note regarding the timing for the loading indicator: I checked with Stephen McCall, to verify the 200ms guide versus 2 seconds. His recommendation was we should just be showing it immediately anytime we are kicking off an action that might take any time to complete and then hiding it when the action is over. Regardless of how long it actually ends up taking. So, please disregard the 200ms or 2 seconds, and utilize the loading indicator for an action that might take any time to complete.

FOR THE LOGIN DRAWER

Log In

If you have an account on NetBenefits, use the same username and password.

Username

loading indicator to be centered horizontally and vertically within the dimensions of the form being processed.

Password

Loading. Please wait.

Log In

Fidelity Members Log In Here

Log In

If you have an account on NetBenefits, use the same username and password.

Helvetica normal 12px #565656 centered

27

Loading. Please wait.

Fidelity Members Log In Here

FOR THE PEEK PAGES

Fidelity.com

Log In

If you have an account on NetBenefits, use the same username and password. New user? Register Now

Username

Password

Log In

Need Help Logging In?

Online Security

Fidelity.com

Log In

If you have an account on NetBenefits, use the same username and password. New user? Register Now

Username

Password

Log In

Need Help Logging In?

Online Security

Fidelity.com

Log In

If you have an account on NetBenefits, use the same username and password. New user? Register Now

loading icon, "small" centered horizontally and vertically

27

Loading. Please wait.

Helvetica normal 12px #565656 centered

Need Help Logging In?

Online Security