

# Silver Bridge Proposed Information Architecture

5/10/2012

Silver Bridge™

The logo graphic consists of a series of vertical lines of varying heights, creating a stylized bridge or arch shape.

hnw

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## Silver Bridge

### Proposed Information Architecture

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# Site Map: Change Log

Date	Author	Description of Change
Dec 8, 2011	P Tulin	Initial Creation
Jan 24, 2012	J Alarcon	Updated Navigation titles
Mar 6, 2012	J Alarcon	Placed design comps into wireframes and interaction notes.
Mar 19, 2012	J Alarcon	Updated interaction notes – Home, Custom Solutions, Case Study pages

## INTERACTION NOTES

*Note: These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.*

4

Silver Bridge

OUR STORY

OUR CLIENTS

CUSTOM SOLUTIONS

EDUCATING OUR CLIENTS

# Insight that spans wealth management. Experience that spans generations.

1

At vero eos et accusamus et iusto odio dignissimos ducim qui blanditiis praesentium voluptatum deleniti atque.

FEATURES &amp; AWARDS

*The Family Wealth Alliance*  
We Place Families First™

Diam porttitor mi derorli morbi feugiat proin vitaefitae elle un mortic unca.

Diam at nulla placerat, pede elementu mauris iaculis, ac a, eget platea et aliam luctusmer de elle der.

IN THE NEWS

2

Diam porttitor mi derorli morbi feugiat proin vitaefitae elle un mortic unca.

Diam at nulla placerat, pede elementu mauris iaculis, ac a, eget platea et aliam luctusmer de elle der.

THOUGHT LEADERSHIP

3

Diam porttitor mi derorli morbi feugiat proin vitaefitae elle un mortic unca.

Diam at nulla placerat, pede elementu mauris iaculis, ac a, eget platea et aliam luctusmer de elle der.

5

## INTERACTION NOTES

## HOME PAGE

**1. Corporate Tag Line and Sub-Text**

The hero space includes a text overlay of the Silver Bridge tag line.  
(*Note:* Since SB will only have one corporate tag line, there is no need to rotate for the initial website.)

- A smaller sub-text overlay below the main tag line will automatically rotate ever 4-6 seconds in fade away fashion. No user interaction is required.

**2. Promo Buckets**

Each promotional bucket includes a promo title, image and supporting call-out copy.

- Automatic Rotation: On initial load (and reload) of the page, only the image and copy slide out simultaneously (from right to left) for all three promo buckets (and replaced by new image/copy). This slide transition occurs simultaneously for all 3 promo buckets every 4-6 seconds.
- On click of any of the promo bucket indicators, automatic rotation of all 3 promo buckets stops and users manually take control.
- On click of the promo image or copy takes user to the corresponding content page.

(*Note:* Promo title remains fixed and does not rotate.)

**3. Promo Bucket Indicators**

- On click of the promo indicators (light gray blips) within the promo bucket will trigger the slide out transition of the promo image and copy (from right to left); The light gray blip which is clicked changes to a dark gray color.

(*Note:* Promo title remains fixed and does not rotate.)

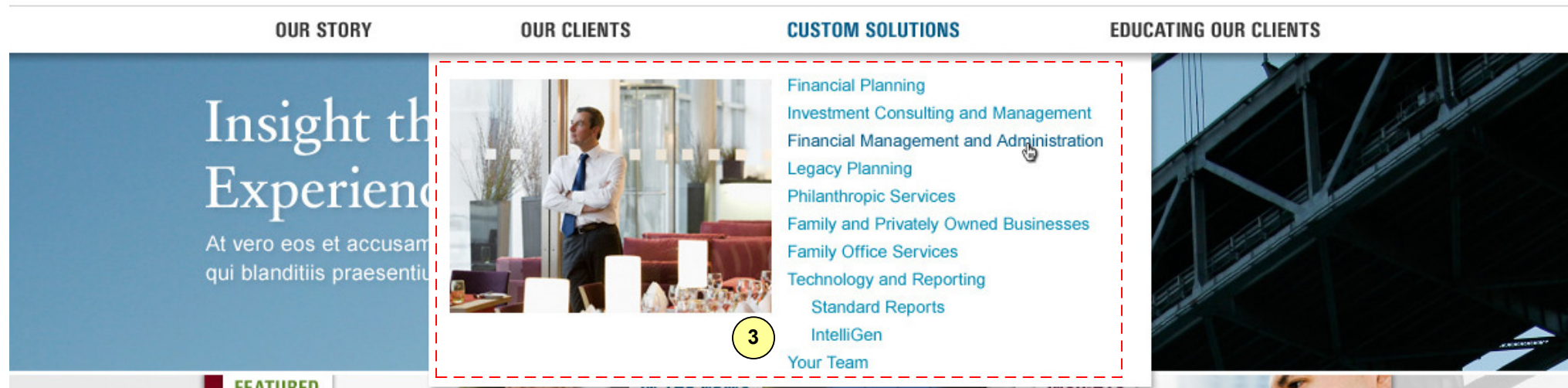
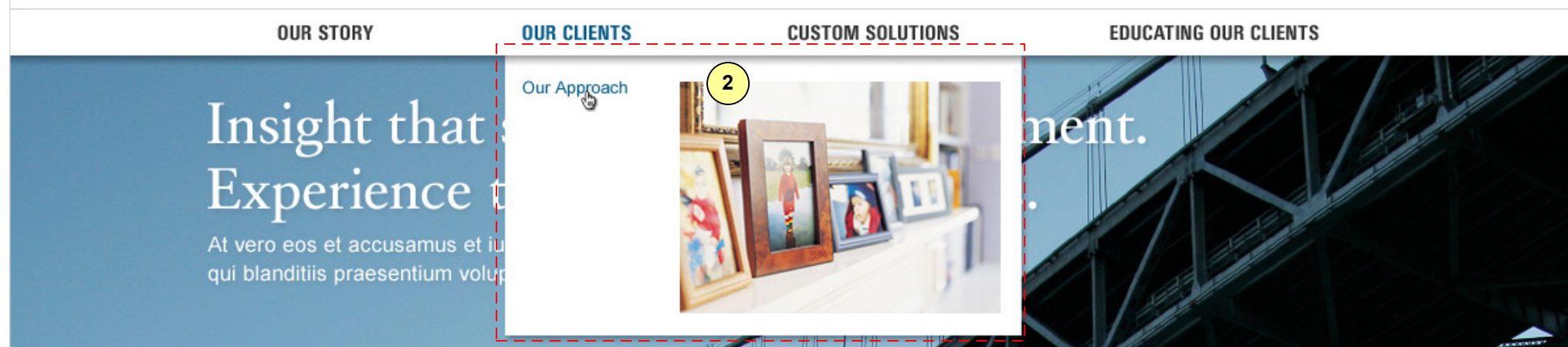
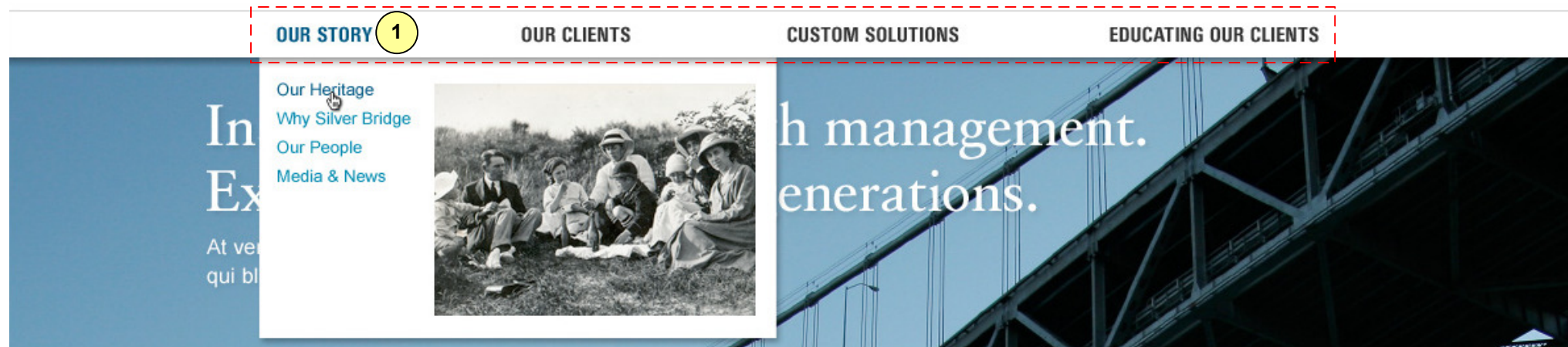
**4. Silver Bridge Logo**

The SB logo remains constant (top left) through out the site.

- On click of SB logo takes user to SB Home Page.  
*Note:* Clicking the logo from the Home Page will reload page.

**5. Background Image**

The background image remains constant throughout the website (does not rotate).



## INTERACTION NOTES

### HOME PAGE (Main Navigation)

#### 1. Main Navigation Bar

The main navigation bar consists of four (level 2) page title sections (*Our Story*, *Our Clients*, *Custom Solutions*, and *Educating Our Clients*) and provides further information when user interacts with each navigation title.

- By Default, each navigation title is a dark grey color.
- On mouse over of nav title changes color to dark blue; on mouse out reverts color back to dark gray.
- On click of nav title takes user to one of the 4 corresponding landing pages.

#### 2. Navigation Sub-Menu

- On mouse over of nav triggers a sub-menu box to slide downward below the main nav bar. As long as the mouse pointer is on the nav title or the sub-menu box, the drop down box remains open.
- On mouse out of the nav title or sub-menu box, the box remains open for 1 second before it closes (no slide effect)
- Moving mouse pointer from one nav title to the other will immediately close the previous sub-menu and open the new sub-menu.

#### 3. Sub-Menu Content

When sub-menu drop down is open:

- A thematic image and page text links are displayed within the box.
- Text links appear in order matching the Site Map with level 3 pages indented; text links appear in light blue color by default.
- On mouse over of text links changes the color to a dark blue; on mouse out reverts color back to light blue.
- On click of text links takes user to corresponding page; navigation bar returns to default (no sub menu boxes are open)

#### 4. Sub-Menu Box Position and Layout

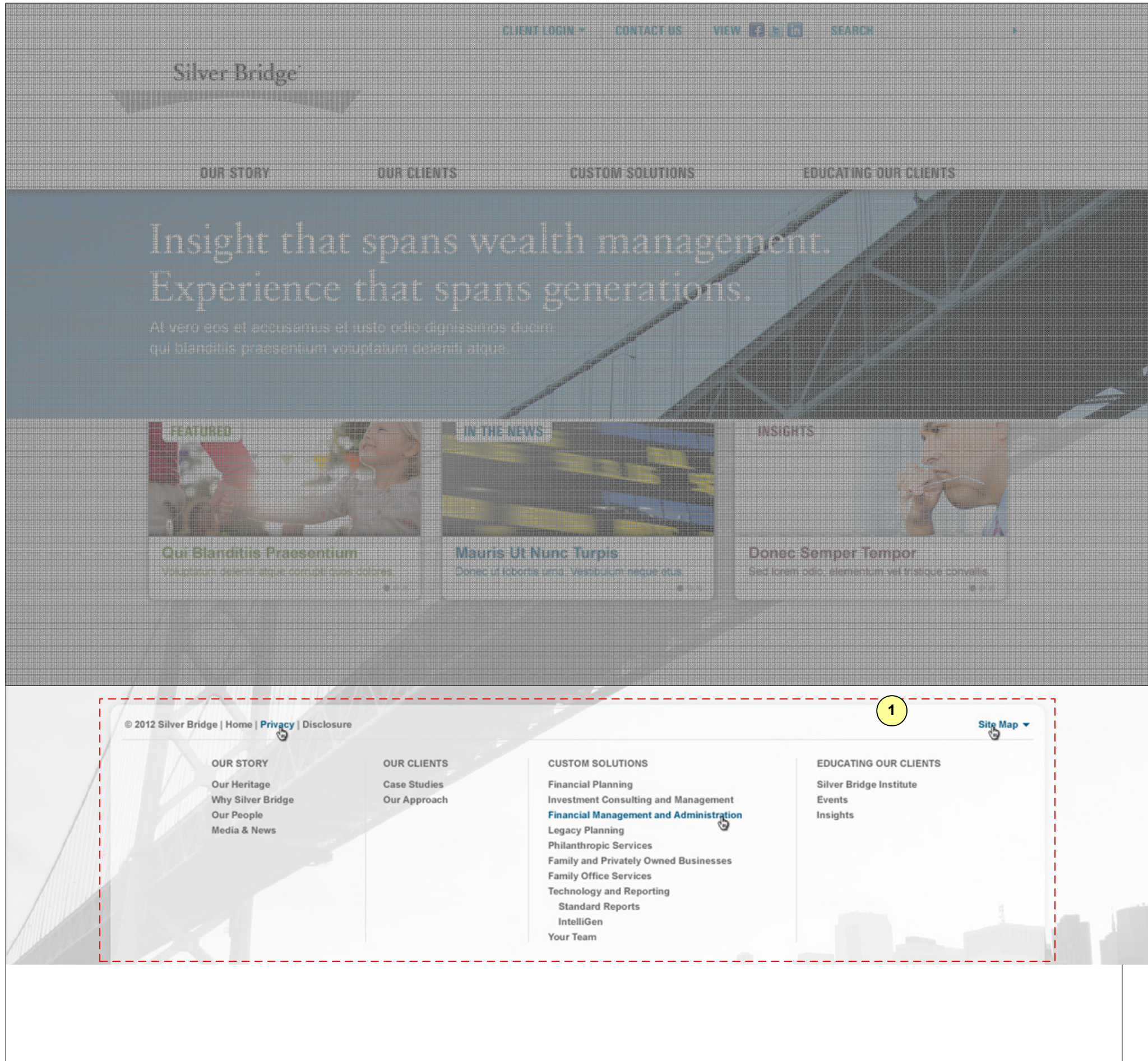
The positions of the sub-menu image and text links changes depending on which nav menu title text is triggered.

- All sub menu boxes appear below the main nav title
- The nav title aligns with the text links in sub-menus.
- For *Our Story* and *Our Clients*, text links displayed inside sub-menus are placed on left while images are displayed to right of text links.
- For *Custom Solutions* and *Educating Our Clients*, sub-menu images are displayed on left while text links are displayed to right of images.

**Note:** These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.

**Silver Bridge | Proposed Information Architecture | Home (Navigation)**

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**INTERACTION NOTES**

**HOME PAGE (Site Map)**

**1. Site Map**

The Site Map is a partially hidden panel which appears flush bottom of browser page. It does not overlap any content on the page (content on page will push the site map down). The site map lists all SB page titles and links to appropriate pages.

- By default, site map remains closed on all pages (including Home) displaying only the *Copyright*, *Home*, *Privacy* and *Disclosures* links as well as the *Site Map* title (accompanied by an Up Arrow Icon).
- On click of the *Site Map* or *Up Arrow icon*, the site map panel slides up from the bottom extending footer area and displaying page titles (site map icon changes to Down Arrow icon).
- The site map is closed when the Site Map/Down Arrow icon is clicked or when user clicks anywhere else on the page.
- On mouse over of text, the color changes to a dark blue; on mouse out, text color reverts back to gray.  
*Note:* there is no onClick text color state
- On click of text links, user is taken to corresponding page

*Note:* These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.



**INTERACTION NOTES**

**HOME PAGE (Global Navigation)**

The Global navigation bar is a toolbar which remains constant throughout the site providing users with access to: Client Login (to SB Portal), Contact Us page, SB Social Media websites, and SB Search.

**1. Client Login**

- By default, the Client Login form panel does is not displayed on any page (including Home); only the Client Login title and Down Arrow icon displayed in light blue is displayed.
- On mouse over of text does not change text color.
- On click of Client Login or Down Arrow, the client login panel slides down; panel displays User Name, Password fields, Log In button, Forgot usernames/password links and Remember me checkbox option.
- On mouse out of panel does not close the panel; users must click on the red X located on top right of panel to close.
- Upon successful submission (no blank fields) a new window is launched open to the SB Portal and the panel closes.
- Error validation occurs only when users submit empty fields (for one or both fields)
  - Error message appears in red within text field (e.g. "Please enter a valid User Name")
  - If incorrect login details are entered and login button is clicked, a new window is launched to SB Portal and further validation occurs in that window and the panel closes.
- On clicking *Forgot Password* or *Forgot User Name* launches new window to SB Portal page (further security questions are handled there); panel closes.
- *Remember Me* check box is unchecked by default; selecting this option after successful submission saves only Username for future use (this depends of SB technical and security rules)

*Note:* On mouse over of text does not change text color.

**2. Contact Us**

- On click of Contact Us takes user to Contact Us page.
- On mouse over of text does not change text color.

**3. Social Media Icons**

- On click of each Social media icon launches a new window to corresponding social media site SB company page.
- View text is not a link; On mouse over of text does not change text color.

**4. Search**

The search feature enables users to search content across SB website

- When user enters a search term and hits enter key or clicks on right hand triangle takes user to *Search Results* page; submitting empty field also takes users to search results page (with appropriate message)
- Search text is not a hyperlink; On mouse over of text does not change text color.

*Note:* These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.

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### Our Heritage

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[Learn more »](#) 1



### Why Silver Bridge

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[Learn more »](#) 1



### Our People

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[Learn more »](#) 1

### Promotional 2

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[Learn more »](#)

### Related Links

[Quam cursus qui sodales vitae sed bibendum tellus condimentum. »](#)

[Porttitor vitae, integer dufaucibus. »](#)

[Egestas dignissim eget, neque et mollis orci tempus habitant. »](#)

### Media & News 3

01/07/2012

[Press Release One Unc Estda](#)

12/22/2011

[Press Release Two Lorem Ipsum](#)

12/16/2011

[Press Release Three Dolor Amet](#)

12/05/2011

[Press Release Four Unc Estda](#)

[Read more »](#)

## INTERACTION NOTES

### Our Story

1. Each section highlights the relevant pages to Our Story (*Our Heritage, Why Silver Bridge, Our People*); each section displays an image, short description and a text link to corresponding page.

- On mouse over of *Learn More* text, the color changes to a dark blue; on mouse out, text color reverts back to light blue. (Note: there is no onClick text color state)

#### 2. Sidebar Element

The *Right Rail* section is meant for SB to place related links or supporting relevant content. Some examples are:

- Executive Quotes
- Related Links
- Promotional Content

#### 3. Media and News

A section for Media and News with links to current press releases.

- Clicking on the links take users to the Media and News page.
- On mouse over of text links changes color to dark blue; on mouse out, text color reverts back to light blue. (Note: there is no onClick text color state)

(Note: The Media and News section may be placed on right rail section for other pages throughout the site)

#### 4. Navigation Text

Throughout the site, when a user is on a page which falls under one of the level 2 pages, the main nav title is highlighted in dark blue to indicate where the user is located relevant to the page.

(Note: Refer to Site Map)

#### 5. Breadcrumbs

The breadcrumbs of a page display its location in the content hierarchy of the SB website. They trace the path from the current page back to the Home page allowing easy navigation up and down the page hierarchy.

- The breadcrumbs are displayed along the top-left of every page except the Home Page.
- Breadcrumb text links higher than the current page appear in light blue by default; The current page breadcrumb text appears in light gray by default and is not a text link.
- On mouse over of text links changes color to dark blue; on mouse out, text color reverts back to light blue.

Home &gt; Page Title &gt; Page Title

## Our Heritage

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2

2

3

4

ORIGINS | EVOLUTION | 1988 | 2009 | 2010 | 2011

### Our Heritage

Lorem ipsum dolor sit amet elle, consectetur adipiscing elit. Integer scelerisque nulla id ante pulvinar egestas unca sans mormapic.

[Learn More »](#)

### Why Silver Bridge

Lorem ipsum dolor sit amet elle, consectetur adipiscing elit. Integer scelerisque nulla id ante pulvinar egestas unca sans mormapic.

[Learn More »](#)

### Our People

Lorem ipsum dolor sit amet elle, consectetur adipiscing elit. Integer scelerisque nulla id ante pulvinar egestas unca sans mormapic.

[Learn More »](#)

### Media & News

01/07/2012

[Press Release One Unc Estda](#)

12/22/2011

[Press Release Two Lorem Ipsum](#)

12/16/2011

[Press Release Three Dolor Amet](#)

12/05/2011

[Press Release Four Unc Estda](#)

[Read More »](#)

## INTERACTION NOTES

### Our Heritage

#### 1. Interactive Timeline

The SB Heritage interactive timeline displays key milestones with associated timeline events. Each timeline event is accompanied with a header, image and supporting copy. Users can click through the milestones and timeline events within the diagram.

- Automatic Rotation: On initial load (and reload) of the page, the diagram automatically slides out (from right to left) beginning at the Origins milestone and the first timeline event within that milestone. This slide transition occurs every 4-6 seconds.

- Automatic rotation stops when user clicks on the diagram. (**Note:** Each Milestone may have one or more timeline events depending on content)

#### 2. Directional Arrows

- On mouse over of the directional arrows changes the color to lighter blue; On mouse out reverts color to original blue.
- On click of directional arrows triggers the diagram to slide to the next / previous timeline event. The header, associated image, and timeline event copy only change.

#### 3. Timeline Event Indicators

- On click of the timeline indicators (gray blips) slides the timeline diagram to the next / previous timeline event
- The timeline indicator is shaded in burgundy to indicate which timeline event the user on within the milestone.
- There are no mouse over states for these indicators.

#### 4. Milestone Title Indicators

- On click of the milestone indicator (e.g. Origins) takes user to the first timeline event of that milestone. The milestone title color changes to burgundy.
- On mouse over of a milestone title changes text color to a darker grey; On mouse out reverts back to light grey.

[Home](#) > [Page Title](#) > [Page Title](#)

## Our People

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1

SEARCH BY NAME 

Search by Region(s):

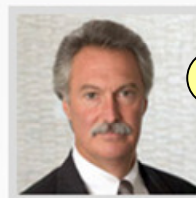
- Northeast
- Mid-Atlantic
- West Coast

2

Search by Role(s):

- Dermanium Verdre
- Hormiertermunca
- Atlantiscon
- Quessentialis Dermite
- Von Helsady Aric
- Norecic Serimista
- Verbasa Que
- Perpetua Elleorca
- Selismondane

3

**Stephen E. Prozano**

Professional Title, Designations

+1 000 000 0000  
[name@silverbridgeadv.com](mailto:name@silverbridgeadv.com)

4

**R. Thomas Manning Jr.**

Professional Title, Designations

+1 000 000 0000  
[name@silverbridgeadv.com](mailto:name@silverbridgeadv.com)**Michelle A. Knight**

Professional Title, Designations

+1 000 000 0000  
[name@silverbridgeadv.com](mailto:name@silverbridgeadv.com)**Paul R. Matherwicz**

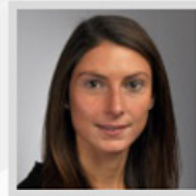
Professional Title, Designations

+1 000 000 0000  
[name@silverbridgeadv.com](mailto:name@silverbridgeadv.com)**Alicia M. André**

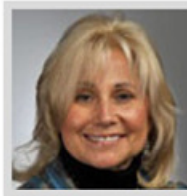
Professional Title, Designations

+1 000 000 0000  
[name@silverbridgeadv.com](mailto:name@silverbridgeadv.com)**Allison L. Taff**

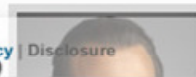
Professional Title, Designations

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**Andrew D. Correia**

Professional Title, Designations

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## INTERACTION NOTES

### Our People

This page lists, by default, Silver Bridge executive team members in two even columns displaying their profile information. There will also be search filters to the left of the profiles list for users to filter by region(s) and/or role(s).

**Note:** If there are an odd set of results, results should be divided as equal as possible 2 columns (e.g. if three results, 2 profiles in 1<sup>st</sup> column and 1 profile in the 2<sup>nd</sup> column)

**Note:** It is assumed there will be a database tagging system to associate region(s) and/or role(s) to each profile name.

#### 1. Search Field

- Users can enter partial or full text of a name to search for a Silver Bridge team member and click the grey arrow (or click Enter on keyboard) to execute search.

(Example: if a user types 'and' and hits enter, the search results should display Alicia M **Andre**, **Andrea** C. Saum, and **Andre** D Correia.)

#### 2. Filter by Region

- Users can also filter results by region by selecting one or more of the region checkboxes.
- By default, these filter checkboxes are not selected.
- On click of text or checkbox will select checkbox (reverse occurs when checkbox is already selected); No roll over effect changes for text occurs

(Example: if a user selects the Northeast checkbox, only those profile names who belong this specific region will be displayed.)

**Note:** Checked box should follow style

#### 3. Filter by Role

- Users can also filter results by selecting one or more of the Role(s) checkboxes.
- By default, these filter checkboxes are not selected.
- On click of text or checkbox will select checkbox (reverse occurs when checkbox is already selected); No roll over effect changes for text occurs

#### 4. Profile Information

- For each Silver Bridge profile, the following information will be displayed :


- Profile Photo
- Full Name
- Professional Title
- Contact number(s)
- Email Address

- On click of profile image or name will take users to individual profile page
- On click of Email address text link launches the user's Email application.
- On mouse over of Email address changes color to light blue; On mouse out reverts back to light grey.

**Note:** These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.

Home > Page Title > Page Title

## Our People



**Alicia M. André**  
Managing Director, CFA

+1 000 000 0000  
name@silverbridgeadv.com

Since 1993, Alicia M. André has been partnering with her clients to grow, manage and protect their assets. Ms. André frequently works with corporate executives, professionals and multi-generational families. Leveraging her 23 years of financial services experience, Ms. André works closely with her Silver Bridge colleagues and clients' external advisors to provide thoughtful investment and wealth management solutions within the context of each client's retirement, estate and tax

planning needs and objectives. Ms. André's experience includes developing strategies for clients who hold restricted and concentrated stock positions.

Prior to joining Silver Bridge, Ms. André was a Portfolio Manager for Boston Safe Deposit and Trust Company, where she managed agency accounts, personal trusts and charitable endowments. Prior to joining Boston Safe Deposit and Trust Company, she was a Financial Analyst in the venture capital industry.

Ms. André, was recently named one of Boston Magazine's 2010 FIVE STAR Wealth Managers, a list made up of less than four percent of the area's 14,600 wealth managers. She holds the Certified Financial Analyst designation, and is a graduate of the Rochester Institute of Technology where she earned an MBA in Finance and a BS in Business Administration. She is a member of the Boston Security Analysts Society and the CFA Institute. Ms. André is also an avid sailor.

"At Silver Bridge, we don't just look at strategies to help a client achieve a specific goal — we also consider how the strategies work in tandem with other strategies already in place. We take the time to fully understand each client's situation before building a holistic plan that integrates all of the client's needs."

Bookmark & Share

Email	Favorites
Google	Google Reader
Y!Bookmarks	Live
Twitter	Reddit
Digg	Delicious
LinkedIn	

SHARE



The 2010 FIVE STAR Wealth Manager list was compiled by Crescendo Business Services, an independent research firm. Crescendo, in conjunction with Boston Magazine, surveyed 105,000 high-net-worth Boston-area residents and 10,200 financial services professionals. Using nine established criteria, respondents evaluated only wealth managers they knew through personal experience. Crescendo screened each wealth manager for regulatory violations, and a blue-ribbon panel of financial services professionals also reviewed each finalist. Only 538 (4%) of the top-scoring wealth managers in the Boston area made the 2010 list. The results of the survey should not be interpreted as reflecting the approval or disapproval of the adviser's services by clients, and is not intended to be indicative of or a promise of future performance.

## INTERACTION NOTES

### Our People: Individual Profile Page

The Individual Profile Page will be an expanded version of the profile information found on the Our People page. This page will include more detailed information about the Silver Bridge individual and a larger profile image.

#### 1. Profile

- Users will be able to click on the individual's Email address launching their Email application.
- On mouse over of Email address changes color to light blue; On mouse out reverts back to light grey

#### 2. Awards Section

- This is an optional section for any relevant awards, certifications or merits associated the individual's profile information (separated by a line)

Note: Linking to external awards websites from this section is be considered best practice for SEO purposes.

#### 3. Sidebar Element

The *Right Rail* section can include related or supporting content such as:

- Executive Quotes
- Related Links
- Promotional Content

#### 4. Share Widget Button

- Share social media widget may be placed on certain pages
- On mouse hover opens a small box with a list of popular social media websites and an Email
- On mouse out closed the box; clicking on x also closes box

Home > Page Title > Page Title

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**1**

FAMILY BUSINESS

FAMILY OFFICE

WOMEN

MULTI-GENERATIONAL FAMILY

**2**

FAMILY FOUNDA

**3**

ENTREPRENEUR

**Hericulum G. Baricallier**  
Eget mi mauris suscipit per, pede mauris suscipite ultricies scelerisque potenti. Blandit habitasse odio. Lobortis netus id, arcu leo laoreet euismod.  
[Read Case Study »](#)

**Lorem K. Dollermite**  
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[Read Case Study »](#)

PROFESSIONAL

CORPORATE EXECUTIVE

## INTERACTION NOTES

### Our Clients

Our Clients landing page displays intro copy and matrix of 8 Silver Bridge client categories.

#### 1. Client Categories

Each client category box includes:

- a. unique thematic image (in gray border)
- b. client category title

#### 2. Client Category Overlay Box

- On mouse over of the client category image, a larger overlay box appears directly over the original client category image (front and center, completely covering client category image); overlay box displays a grayscale version of the client category image as the background with category title at bottom left of box and related case study copy.
- On mouse out of overlay box closes it immediately.

#### 3. Case Study Links

- The client category overlay box displays 1 to 2 related case studies (the SB solution), accompanying case study title, supporting copy and links to the individual case study page; Case study title and call to action "Read Case Study" are text links in light blue.
- On mouse over of the case study title or "Read Case Study" text changes color to dark blue; on mouse out reverts to light blue color.
- On click of case study title or "Read Case Study" text takes user to the individual case study page.

Home > Page Title > Page Title

# Client Name

Client Type | Profession or Business Name | Location

1



Entrepreneurs

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### The Situation

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### How We Helped

Financial Planning	<b>Financial Management and Administration</b>	Philanthropic Services	Family Office Services
<b>Investment Consulting and Management</b>	Legacy Planning	Family and Privately Owned Business Consulting	<b>Technology and Reporting</b>

2

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## INTERACTION NOTES

### Our Clients: Case Study Detail Page

The Case Study detail page is simple and concise, displaying the SB client, the situation, issues/need, and how we helped them with highlighted solution(s) and description.

#### 1. Client Details Case Study

The case study clearly displays the type of client depicted in this case study - client type (e.g. Entrepreneur), Profession (e.g. Business Owner), and Location

#### 2. How We Helped / Custom Solutions section

The custom solutions section is always displayed to the right of the case study image and situation copy. A matrix of SB custom solutions are displayed with highlighted solution(s) in a dark blue background – this is the solution(s) implemented by SB to resolve the case study situation/issue.

Note: Each case study page will always have one or more solution highlighted.

- On mouse over of the highlighted solution, the white text changes to light blue text; on mouse out text color reverts back to white.
- On mouse over of another solution box, the light gray text changes color to dark blue; on mouse out text reverts back to light gray.
- On click of any solution box takes users to the relevant individual custom solution page.

[Home](#) > [Page Title](#) > [Page Title](#)

## Custom Solutions

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1

- Investment Consulting and Management
- Financial Planning
- Financial Management and Administration
- Legacy Planning
- Philanthropic Services
- Family and Privately Owned Business Consulting
- Family Office Services
- Technology and Reporting

Investment Consulting and Management 3



2

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[Learn more »](#)

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### Case Studies

Client Name or Type  
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[Read now »](#)

Client Name or Type  
Quam cursus qui sodales vitae sed, bibendum tellus, libero condimeni.  
[Read now »](#)

Client Name or Type  
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[Read now »](#)

### Promotional

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[Learn more »](#)

### Related Links

[Quam cursus qui sodales vitae sed, bibendum tellus condimenum. »](#)  
[Porttitor vitae, integer dufaucibus. »](#)  
[Egestas dignissim eget, neque et mollis orci tempus habitant. »](#)

## INTERACTION NOTES

### Custom Solutions

The Custom Solutions landing page provides a overview and interactive section which lists all of SB custom solutions -- including custom solution title, image and supporting copy.

#### 1. Custom Solutions Section

The Custom Solutions section displays all solutions on the left side and depending on which one is selected by the user, changes the content (image & copy) on the right side to match the custom solution.

- By default, the Custom Solutions section always highlights *Financial Planning (or the first solution)* when a user arrives on this page via Main Navigation, Breadcrumbs or Sitemap; a highlighted solution is displayed in a dark blue background and white text.
- On Mouse Over **and** On Click of a custom solution (not highlighted), the text color changes to white and background color changes to dark blue; the previous highlighted custom solution reverts to dark gray text and light gray background.

**Note:** On mouse out does not changes state, unless user moves mouse pointer to another solution.

#### 2. Content area for section overview

- On mouse over **and** On Click of a custom solution, the relevant custom solution header, image overview text and text link changes on right side of the section (no transition effect);

#### 3. Link to a corresponding section page

- On mouse over of the Solution title or *Learn More* text link changes color to dark blue; on mouse out reverts text link to light blue
- On click of the solution title or *Learn More* text link takes users to corresponding custom solution page.

## Family Office Services

SILVER BRIDGE  Family Office Partners



Our experienced team of professionals understands the challenges facing families and the impact of the economic and regulatory environment on family wealth.

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### Key Benefits

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### Standard Reports

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[View Standard Reports »](#)

### IntelliGen

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[Visit IntelliGen »](#)

### Schedule a Conversation

If you would like to hear from a Silver Bridge Advisor at your convenience, please fill in and submit our brief contact form.

[Contact Form »](#)

## INTERACTION NOTES

### Custom Solutions (Template)

#### 1. Sub Branding

- SB sub brand appears on the top right of the custom solution page (horizontally aligned with bottom of the page Header).

#### 2. Right Rail Element

- Links to the third level section may be provided in the right rail (e.g. for relevant sections)

#### 3. Contact Form Link

- Link to the popup contact form can be also placed on right rail.

Home > Page Title > Page Title

# Technology and Reporting



## IntelliGen

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[Learn more »](#)

1

## Standard Reports

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[Learn more »](#)

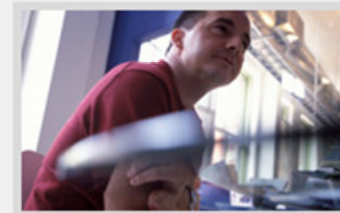
1

## Schedule a Conversation

If you would like to hear from a Silver Bridge Advisor at your convenience, please fill in and submit our brief contact form.

[Contact Form »](#)

2



## Promotional

Lorem ipsum dolor sit amet elle, consectetur adipiscing elit. Integer scelerisque nulla id ante pulvinar egestas unca sans mornnapic.

[Visit IntelliGen »](#)

## Related Links

[Quam cursus qui sodales vitae sed, bibendum tellus condimentum. »](#)

[Porttitor vitae, integer dufaucibus. »](#)

[Egestas dignissim eget, neque et mollis orci tempus habitant. »](#)

[Quam cursus qui sodales vitae sed, bibendum tellus condimentum. »](#)

## INTERACTION NOTES

### Custom Solutions: Technology and Reporting

1. The Technology and Reporting landing page displays brief intro copy for the IntelliGen platform and Standard reports in 2 columns below a large image.

- Each section has a call to action text link (in light blue) which links to each respective page
- On mouse over of text links changes text color to dark blue; on mouse out reverts text color to light blue.
- On click of text links takes users to respective third level section pages.

#### 2. Contact Form Link

- Under *Schedule a Conversation*, a text link to the popup contact form can be also placed on right rail.
- On mouse over of *Contact Form* text link changes text color to dark blue; on mouse out reverts text color to light blue.
- Clicking on the *Contact Form* text link opens a form box (lightbox)

Home > Page Title > Page Title

# IntelliGen

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## INTERACTION NOTES

### Custom Solutions: IntelliGen

The IntelliGen page provides an overview of the Silver Bridge platform and an interactive graphic element divided into 4 sections to highlight each part of the platform.

#### 1. IntelliGen Interactive Graphic

- By default, the DataDock section is highlighted in dark blue along with the supporting copy below the section
- On mouse over of each section, the colors and images change to highlight the new section (a dark blue); The previous section reverts back to light blue section.  
(Note: The "Security Entitlements" appears for each section that is highlighted.)
- There are no links within the text copy.

Home > Page Title > Page Title

# Standard Reports

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## Schedule a Conversation

If you would like to hear from a Silver Bridge Advisor at your convenience, please fill in and submit our brief contact form.

[Contact Form »](#) 4



## Promotional

Quam cursus qui sodales vitae sed, bibendum tellus condimentum. »

## Related Links

Quam cursus qui sodales vitae sed, bibendum tellus condimentum. »

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Norttitor vitae, integer gu faucibus. »

Gestas dignissim eget, nequelle mollis orci tempus habitant. »

Report Sample Title

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REPORT TYPE

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[View Larger Sample »](#) 2

SAMPLE REPORTS < 1 2 3 4 5 3

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## INTERACTION NOTES

### Custom Solutions: Standard Reports

#### 1. Standard Report Overview Graphic

- The Standard Report graphic provides users an overview of the set of standard reports provided by SB (sample reports)

#### 2. Open Larger Report

- On click of the "View Larger Sample" will open a larger version of the sample report image over the current page (pop-ups utilize lightbox). The overlay treatment will be similar to the Contact Form overlay.
- There is no on mouse over effect for this text

#### 3. Report Indicators

- On click of the Standard Report indicators will change the report sample image, header and copy. The text indicator color will change from light blue to burgundy
- On Mouse over of number will not change color
- Use standard pagination with back and forward arrows when needed.

#### 4. Contact Form Link

- Link to the popup contact form can be also placed on right rail.

Home > Page Title > Page Title

# Contact Us

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**BOSTON**

Map showing the location of the Northeast Office in Boston, MA. A red pin is placed on the map, and a circled '1' is overlaid on the map area.

## Our People

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[Learn more »](#)



## Main Office

+1 000 000-0000

## Schedule a Conversation

If you would like to hear from a Silver Bridge Advisor at your convenience, please fill in and submit our brief contact form.

[Contact Form »](#) **3**

<p><b>Northeast</b></p> <p>255 State Street Boston, MA 02109 +1 650 257 6200 Main +1 650 257-6204 Fax info@silverbridge.com</p> <p><a href="#">Get directions »</a> <b>2</b></p>	<p><b>Mid Atlantic</b></p> <p>Barley Mill House 3701 Kennett Pike, Suite 100 Greenville, DE 19807 +1 650 257 6200 Main info@silverbridge.com</p> <p><a href="#">Get directions »</a></p>	<p><b>West Coast Office</b></p> <p>2027 Fourth Street, Suite C Berkeley, CA 94710 +1 650 257 6200 Main +1 650 257-6204 Fax info@silverbridge.com</p> <p><a href="#">Get directions »</a></p>
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## INTERACTION NOTES

### Contact Us

The Contact Us page displays the Silver Bridge office location, office location photos, map and relevant office contact details.

#### 1. Office Location Slideshow

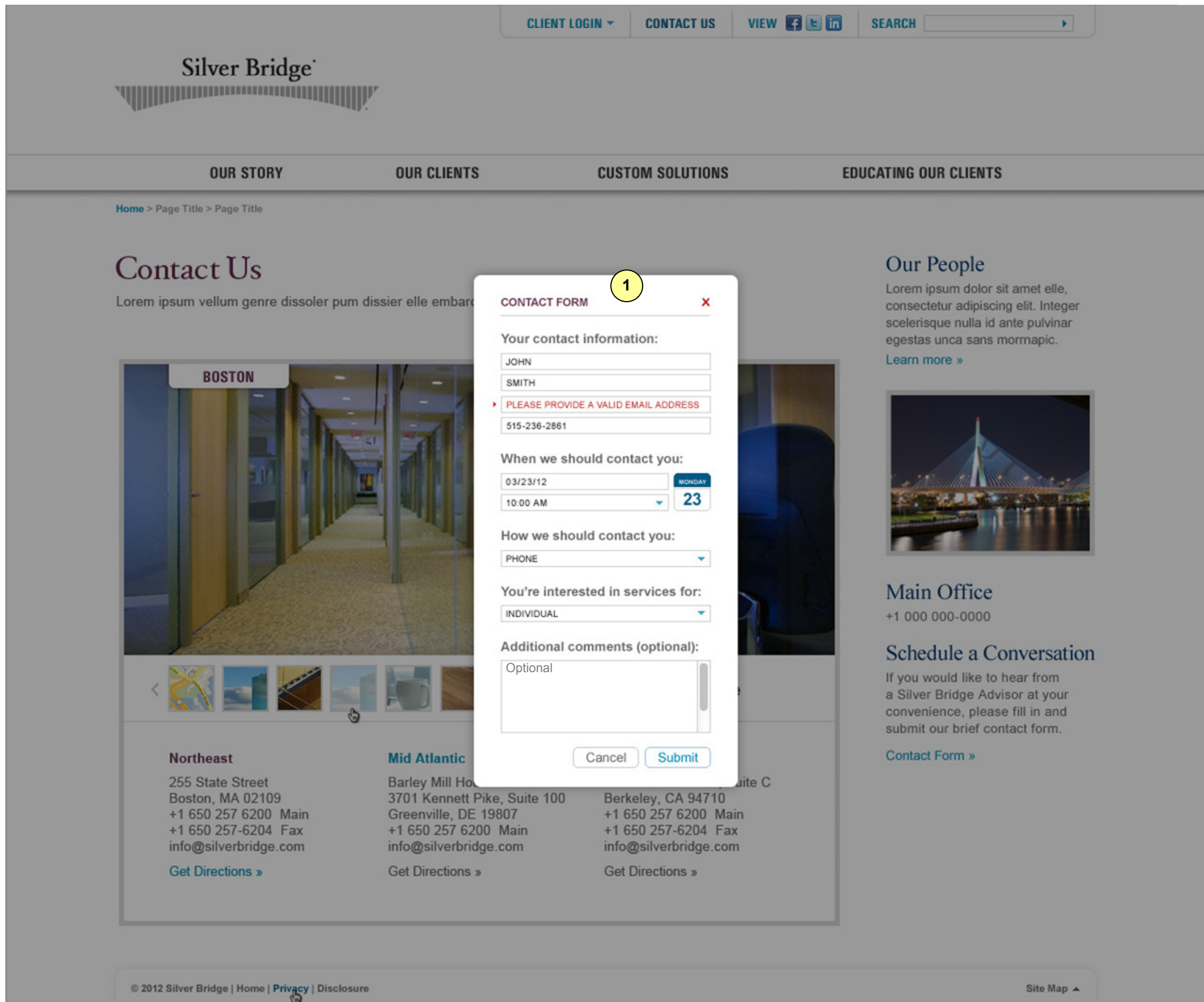
- By default, the Northeast location is displayed with an image of a map and pin drop location of the Boston office. (note: Map is a static image)
- A slideshow of corporate office images are shown in a strip with thumbnails of images. Thumbnail of current image is grayed out to indicate it is displayed.
- Users can use the arrows to switch image display and rotate through all the office photos.
- Users can also click on the individual thumbnails to display the office photo as well.

#### 2. Office Locations

- When an office location is selected, the office location name is highlighted in burgundy text and the "Get Directions" text appears in light blue
- Office locations not selected - office location name appears in light blue and the "Get Directions" text appears in light grey.
- Users can click on "Get Directions" and this will open a window to Google maps with the appropriate office location.

#### 3. Contact Form Link

Link to the popup contact form can be also placed on right rail.



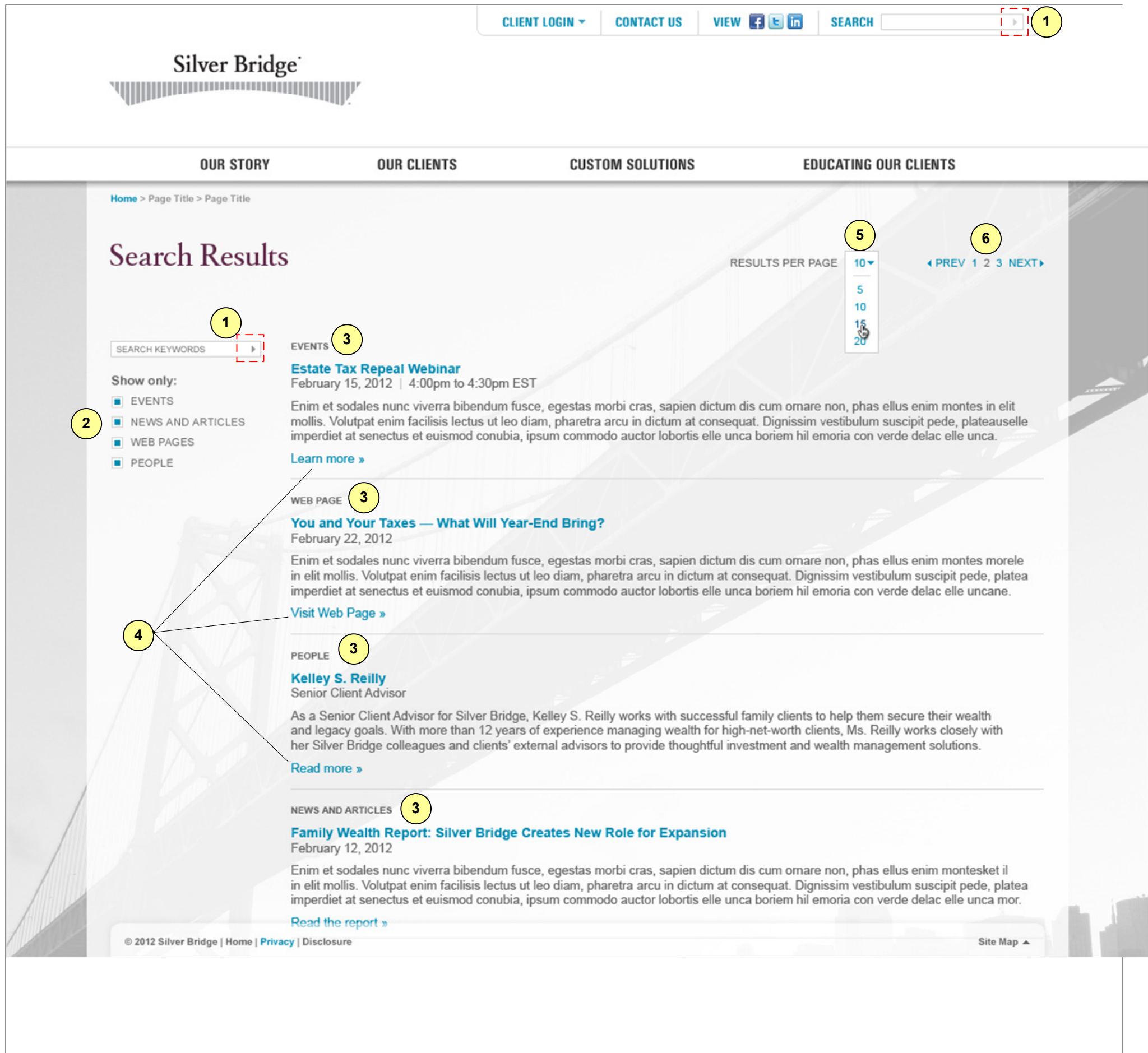
**INTERACTION NOTES**

**Contact Form**

- 1. Contact Form**
- Upon clicking the Contact Form text link triggers a contact form box (lightbox effect) to appear
  - By default, all text fields have instructional text prompting users to fill in appropriate text fields (e.g. First Name, Last Name, etc)
  - Upon successful submission (no blank fields) a confirmation message will replace the form (confirmation Email should be sent) with text link to close window
  - Users can click on red x or Cancel button to close window (or click on close link from the confirmation section).
  - All fields except for the "Comments" section are required.
  - Standard error validation occurs only when users submits empty fields (for one or more of the required fields)
    - Error message appears in red in text field (e.g. "Please provide a valid Email Address")
  - If incorrect login details are entered and login button is clicked, a new window is launched and further validation occurs in that window
  - Calendar icon launches calendar widget allowing user to select date which populates the Date field
  - Users can select from Time drop down a list of 24 or 48 hours (customizable)

(Note: There are no text links within contact form)

*Note: These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.*



**INTERACTION NOTES**

**Search Results**

The Search Results page lists all Silver Bridge content results after has submitted a search term from the Search field located in the Global navigation. Results are displayed in one column and grouped by content type. There will also be filters to the left of the search results to filter by events, News, Web pages, and people.

*Note:* It is assumed there will be a database tagging system to categorize content types.

**1. Search Field**

- Users can enter partial or full text to search and click the grey arrow (or click Enter on keyboard) to execute search.
- If no search term is entered the page will reload with no results and a message “No results were found. Please try your search again”.
- Upon successful submission, search results will be displayed with a title/ name, date or editor (depending on content type), up to 3 lines of text and call to action text link.

**2. Filter by Content Type**

- Users can also filter results by content type by selecting one or more of the checkboxes.
- By default, these filter checkboxes are not selected.
- On click of text or checkbox will select checkbox (reverse occurs when checkbox is already selected); No roll over effect changes for text occurs

*(Example: if a user selects the Events checkbox, only those search results associated with events will be displayed.)*

**3. Content Grouping**

- Content type will be specified and grouped

**4. Call to Action Links**

- Call to action link will be content specific and will lead to a corresponding page, individual profile page, event, article or document.

**5. Results Per Page**

- User will be able to change a number of results presented on the page; (this is a styled drop down select field)

**6. Pagination**

- Standard pagination with previous and next links will be displayed when applicable
- If user is on first page of results, then PREV and 1 will not be clickable.
- There are no roll over effects for pagination items

*Note:* These information architecture layouts are for informational purposes only. All screen sizes are approximate. All visual design elements and copywriting are not final.