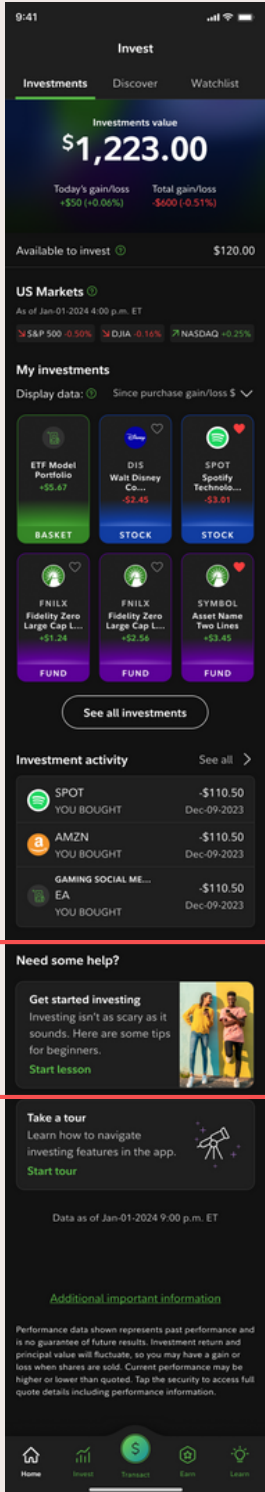


Fidelity Youth[®]

“Basics of investing” first-time investor education flow

Fidelity Youth is a financial app designed for teens (ages 13-17) to help them learn the basics of saving, spending, and investing and prepare for a financially independent future. As lead UX Content Strategist for the Youth app, I was tasked with creating in-the-moment learning content that would help novice teen investors overcome barriers, understand key concepts, and feel confident placing their first trade.



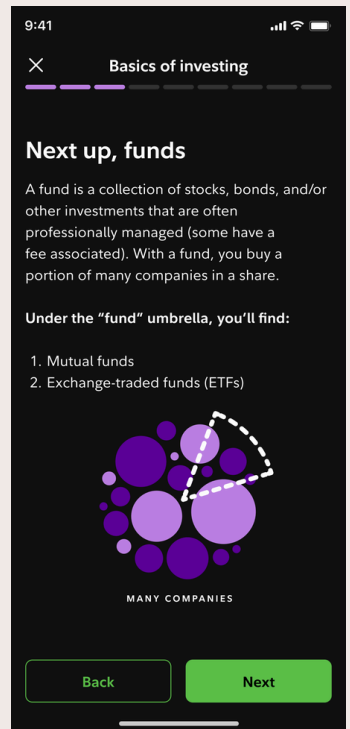
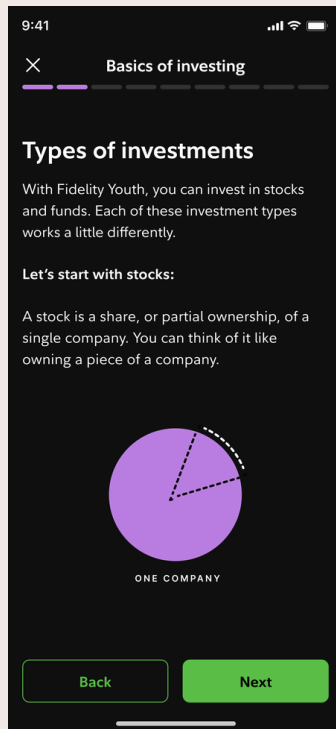
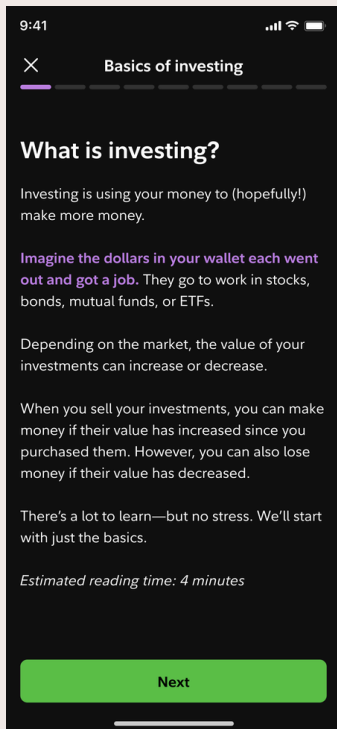
Challenge

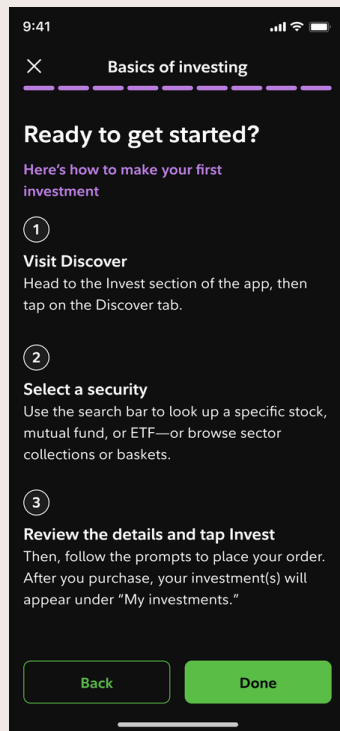
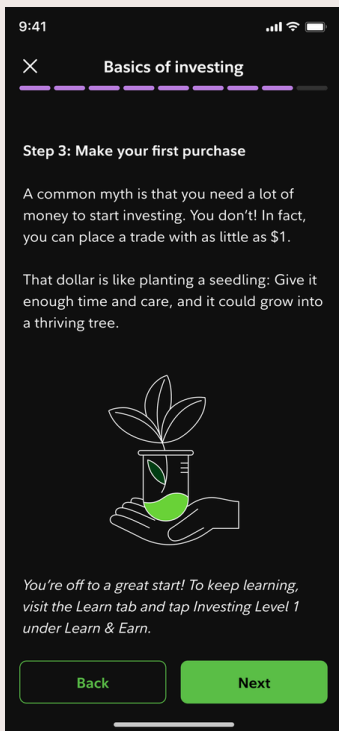
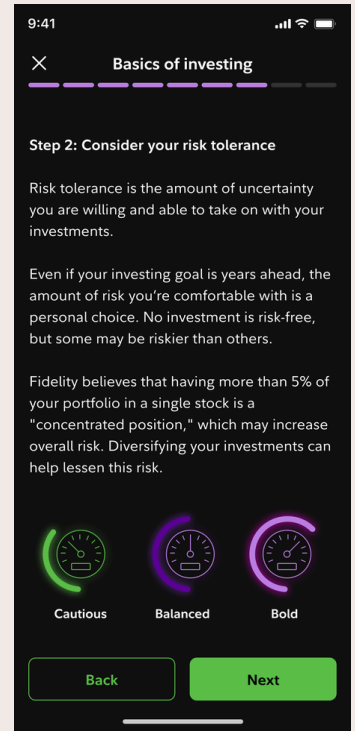
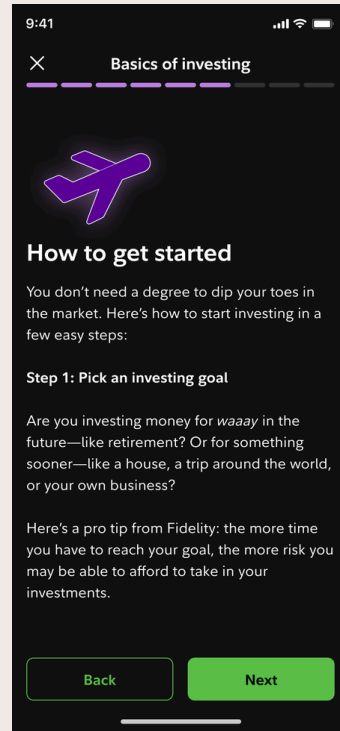
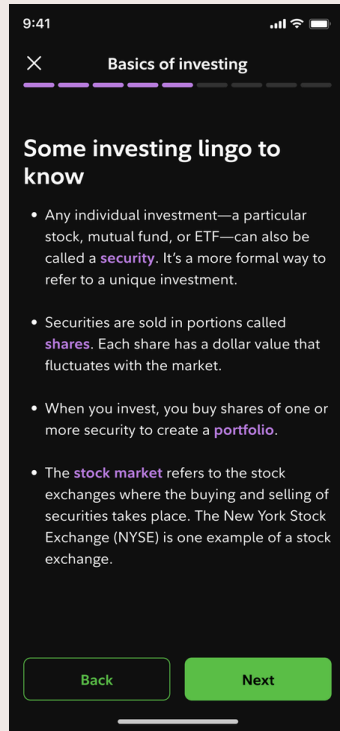
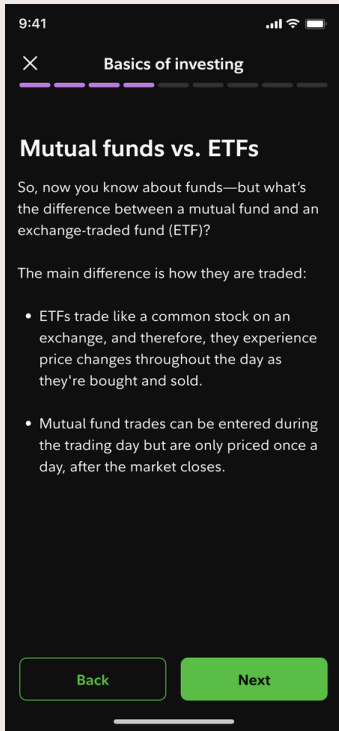
Through user research, we learned that teens were excited to begin investing, but many were **nervous to trade for the first time** and **fearful of losing money**; many felt they **didn't know enough to invest**.

Solution

While there was already a progressive learning curriculum (incl. Spend, Save, & Invest modules) in a dedicated “Learn” section of the app, I proposed we build additional contextual education directly into key entry points within the app.

The entry point to investing—the “Invest” tab—was the first place we experimented with this. I wrote and designed the below “first-time investor flow” in an effort to provide absolute beginners with a handful of the most vital tips & information they’d need to begin investing.





Challenge

Today's teens prefer video over dense text, but a limited budget required starting with static content for the MVP.

I had to **condense complex information into a few screens**, interviewing Fidelity Asset Management SMEs to gather content and **translating technical financial jargon** into relatable, teen-friendly language.

Solution

I leveraged our interactive "Instagram story"-style swipe tour component, collaborated with my UX design partner on impactful illustrations, and enhanced readability with bullet points, bold/purple text for key terms, and ample white space.

Results

77%

average content completion rate
(Sept. 2023 - Oct. 2024)

17.6%

increase in trading volume upon
release of refreshed content
(Sept. - Oct. 2024)

Learn more about Fidelity Youth:

