



EVDirect Phase 1

Release Notes

9th June 2021





Summary

At EV, we are constantly looking to improve the functionality of our solutions, to improve the financial education that we can offer to consumers.

We have 4 phases planned to enhance several of our EVDirect solutions. This first phase focusses on the following solutions:

- EVDirect Risk
- EVDirect Income Strategy
- EVDirect Retirement Options

These updates have been released into our Test environment on 9th June and, once all 4 phases are complete, we will be working closely with our clients to release into Production environments. These notes provide further details on this phase.

The updates can be accessed in Test by using the following link: ev.uk/guidance-community-access

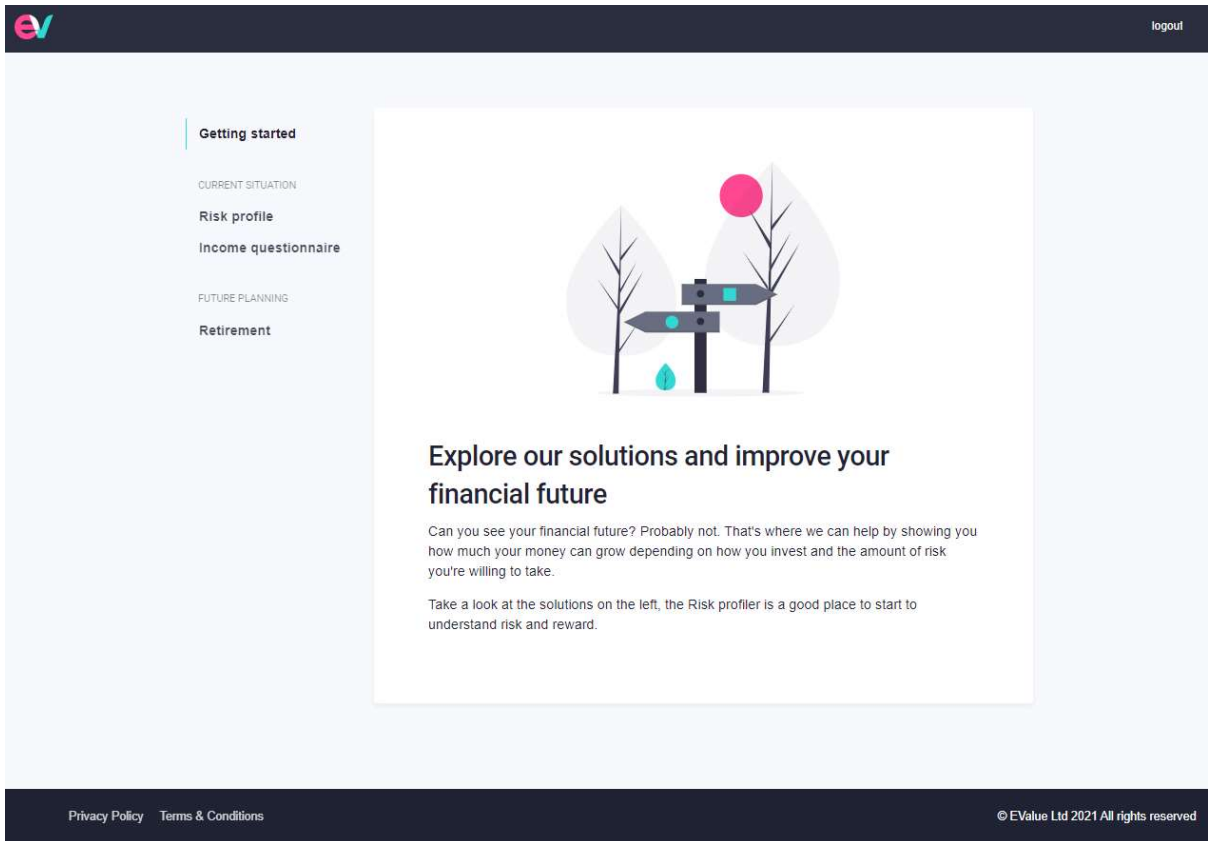
All communications regarding these phases within the EV Innovation Community will be sent from davidmcdonald@ev.uk – please let us know if you have any questions or need any help with the new features.



Updates

EVDirect Homepage

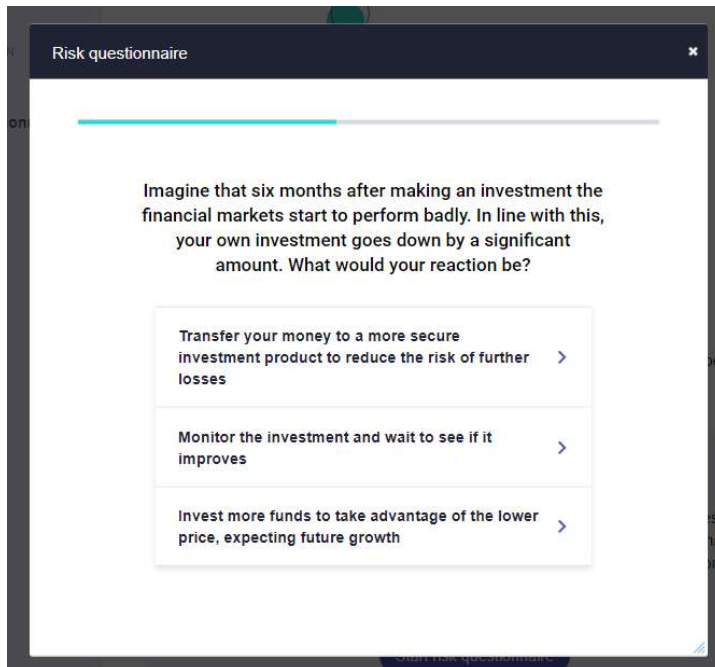
We have updated the branding on the home page to be in line with our recent rebrand to EV.



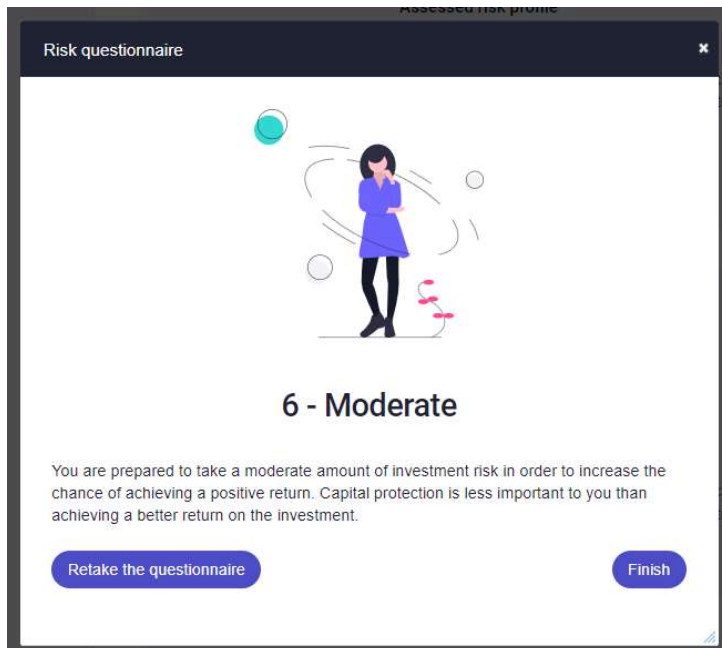


EVDirect Risk

As part of the branding update for EVDirect Risk, we have also worked through a full review of the content (outside of questions and risk descriptions).



For the risk questionnaire modal, we have also added a new summary page to show the user what risk profile they are and an accompanying risk description.



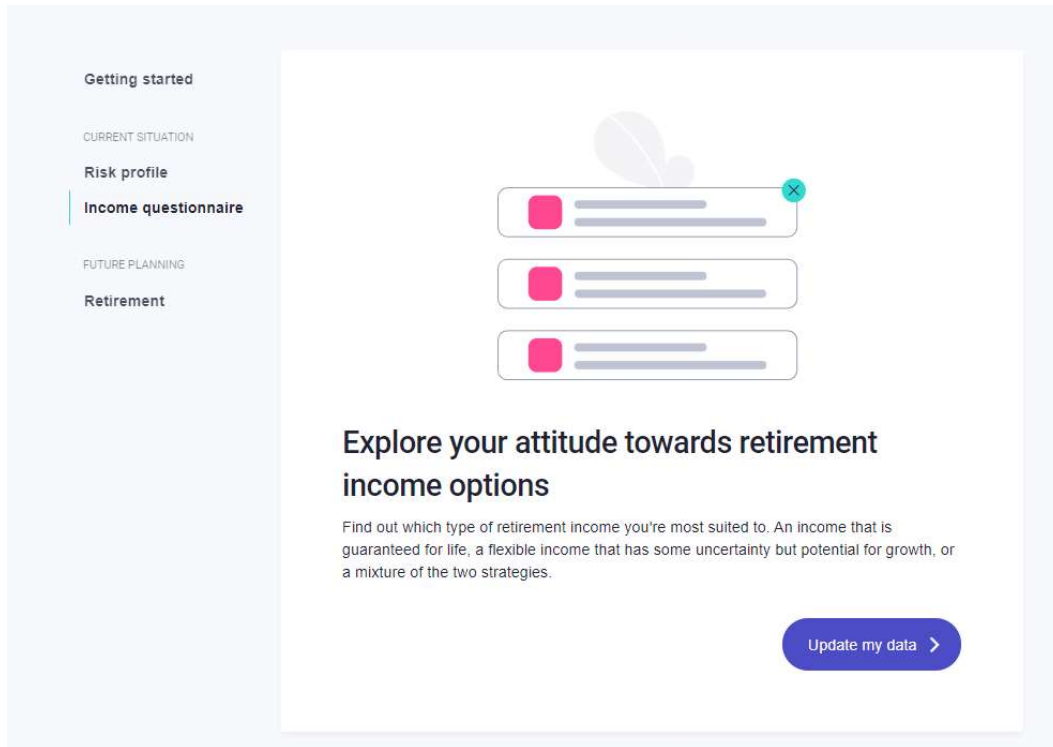
Once the user clicks Finish, they are then shown the risk profile page with the ability to view different risk profiles and the accompanying sample investment forecast.



We have also reordered the structure of this page to better support the user's education. It flows from their assessed risk profile, into the ability to view different risk profiles and then the sample investment forecast.

EVDirect Income Strategy

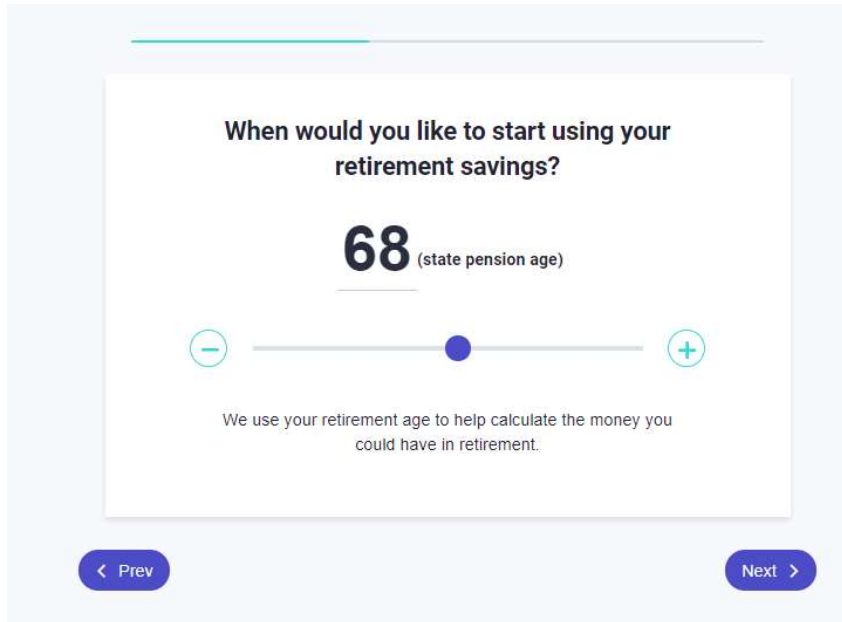
The EVDirect Income Strategy has also had a branding update and content review.





EVDirect Retirement Options

EVDirect Retirement Options has also had a branding update and content review. We have made changes to each of the screens throughout the tool to be more mobile responsive, with further work in this area due to be completed in later phases.



We have also taken a fresh look at the summary screen where the user is presented with the 3 options. We are now drawing more attention to the variance in market conditions, as well as the various help text available.

A call to action button can now be utilised on the summary screen, allowing the redirection of users back into their original journey.



What will you do with your retirement savings of
£ 76,900 at 68?

Results are shown in [today's prices](#) and for an [average outcome](#). When determining which option is right for you, it's important to consider [how much you might need](#) and [how long you might need it for](#). For more information [click here](#).

Explore the range of possible outcomes

Weak return ———— Strong return

Annuity Learn more	Flexible income Learn more	Cash Learn more
Take 25% as a tax-free lump sum: £19,200	Take 25% as a tax-free lump sum: £19,200	Take it all as a lump sum and get: £62,700
Followed by an after-tax annual income guaranteed for the rest of your life: £11,700	Followed by an after-tax annual income of your choice until the money runs out: £0 ^{until age 100}	After paying income tax on the money above 25% totalling: £14,200
Your income includes an assumed State Pension of £9,370.	Your income includes an assumed State Pension of £9,370.	You will continue to receive your State Pension, assumed to be £9,370.
I like this option	I like this option	I like this option

[Amend details](#) [View your pension](#)

A new bit of functionality that has been added to EVDirect Retirement Options, and additional tools in later phases, is the ability for the user to give feedback. If they click upon the “Give feedback” button in the top right corner, then a modal will appear allowing them to provide a star score out of 5 and some specific text feedback.

Your opinion matters to us

How useful did you find this tool?

★ ★ ★ ★ ★

Please leave a message here

[Leave feedback](#)

[Maybe later](#)