

## Card Sort Analysis

<p><b>Investment Performance</b></p> <hr/> <p>Portfolio holdings +7            Performance metrics +6            Account summary +4            Vanguard account details +4            Asset allocation chart +3            Goal progress +3            Monthly/quarterly statements +2            Financial Goals +2            –            Rebalancing tool +1            Goal optimizer +1            Robo-advisor investing strategy +1            Transaction history +1            Robo-advisor personalization +1</p>	<p><b>Learning Center</b></p> <hr/> <p>Education resources +8            Customer support +2            Goal optimizer +2            –            Transaction history +1            Goal progress +1            Robo-advisor personalization +1</p>	<p><b>Tools &amp; Calculators</b></p> <hr/> <p>Calculators +7            Customer Support +4            Goal optimizer +3            Rebalancing tool +3            Performance metrics +2            Financial goals +2            Goal progress +2            Asset allocation chart +2            –            Tax Documents +1</p>
<p><b>Taxes &amp; Documents</b></p> <hr/> <p>Tax documents +6            Transaction History +6            monthly/quarterly statements +6            Account summary +4            Vanguard account details +4            –            Portfolio holdings +1</p>	<p><b>Robo-Advisor Settings</b></p> <hr/> <p>Robo-advisor personalization +5            Robo-advisor investing strategy +6            Rebalancing Tool +3            Asset Allocation Chart +2            Customer support +2            Financial goals +1</p>	<p><b>Goal Tracking *NEW</b></p> <hr/> <p>Goal optimizer +1            Financial goals +1            Goal progress +1</p>

Financial goals +1 Rebalancing Tool +1 Calculators +1		
<b>Adjusting Investments *NEW</b> <hr/> Asset allocation chart +1 Robo-advisor investing strategy +1	<b>Financial Goals</b> <hr/> Goal optimizer +1 Financial goals +1 Goal progress +1	