

Vanguard's Robo-Advisor Usability Test: Participant Consent Form

Thank you for agreeing to participate in this usability test for Vanguard's robo-advisor digital products. Your feedback is invaluable in helping us improve our services. Before we begin, please read and understand the following information:

The purpose of this usability test is to evaluate the user experience and functionality of Vanguard's robo-advisor digital products. We want to understand how well the platform meets your needs and identify any areas for improvement.

For this study, you will be asked to perform specific tasks using the robo-advisor's public web pages and prototypes of the dashboard and to answer questions related to your experience performing the tasks. You will be asked to think aloud as you navigate through the sites.

The session will be conducted over Zoom and should take no more than 1 hour of your time. The usability test session will be recorded for analysis. By participating, you consent to the recording and use of your feedback. You may withdraw from the test at any time without penalty. This recording, in addition to any notes taken by the moderator, will be used for analysis on how to improve Vanguard's services.

Your participation is voluntary. Your responses will be kept confidential and used solely for research purposes. Your personal information and recording will not be shared with any third parties outside of Vanguard's user research team and the usability testing team composed of students in the UNC-Chapel Hill class, MEJO 581: User Experience Design and Usability (Section 2).

There are no right or wrong answers, as the usability study is intended to test the products of Vanguard and *not* your abilities in any way. You are welcome to take a break, ask questions, or stop the study at any point through the session. While this study does not include a monetary incentive, you will be rewarded for participation with a candy box of your choice.

If you have any questions or concerns, please feel free to ask. You can contact the user researcher ___[fill in name of group member]_____ at ___[replace with your email]_____.

Please sign and date the fields below to indicate that you have read and understood the information in this consent form and that you agree to participate in the usability session.

Date: _____

Please print your name: _____

Please sign your name: _____