

2013 GOLD MONITOR AWARD WINNERS



MUTUAL FUNDS

ABOUT CORPORATE INSIGHT

Corporate Insight provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we research, providing our clients with unparalleled, unbiased intelligence on the competition.

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CATEGORY OVERVIEW

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2. Investor Performance Reporting
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4. Product Pages
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PUBLIC HOMEPAGE

American Century wins a Gold Monitor award for maintaining an attractive homepage that provides strong images and links to key features and commentary resources. This is the third year running that American Century takes home the Gold for homepage design.



INVESTOR PERFORMANCE REPORTING

Vanguard receives a Gold medal for providing a customizable, holistic view of performance data to greet private site clients as soon as they log in to their accounts. The Performance page offers a variety of options, with a Personal Performance sub-section displaying a line chart of dollar returns, which investors can modify according to any timeframe they wish. The firm includes many explanatory callout boxes to educate investors, and investors are provided with choices to view data in tables or charts, according to their preference.



RETIREMENT CENTERS

Fidelity receives the Gold Monitor award for its robust retirement center, offering a full set of resources organized according to four life stages that each include a list of actionable steps investors in that age group should consider. Throughout each page, the outline provides links to related pieces in the firm's Viewpoints section, which can include articles, video and audio.



PRODUCT PAGES

Vanguard wins Gold for providing strong, easy-to-navigate product profiles with several tabs of information that conveniently break up data for investors. The pages are organized efficiently into six tabs and a high volume of explanatory charts and value-added features. Aside from cosmetic changes, the firm's profiles remain the same as when we last explored this topic.



FUND SCREENERS

Fidelity won a Gold Monitor award for a feature-rich fund screener, which received a slight update in May of 2013. With a flexible range of inputs catering to expert and novice investors alike, the tool presents a detail-rich results display in which users can drill down according to a number of variables including desired asset class or risk level, investment category, Morningstar rating, and returns and expense levels.



NAVIGATION

The Gold Monitor award goes to ING, which revamped its investor site late last year. The firm's new navigation controls include main menu flyouts with larger links for overview pages and smaller ones for content. The firm also incorporates the use of images to promote ING services.



CONTACT US



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