

Ally Invest

01 - Trade Ticket Re-Design

02 - Invest Account Opening

03 - Ally Storefront

LUIS RABINES

ALLY CASE STUDY 2025

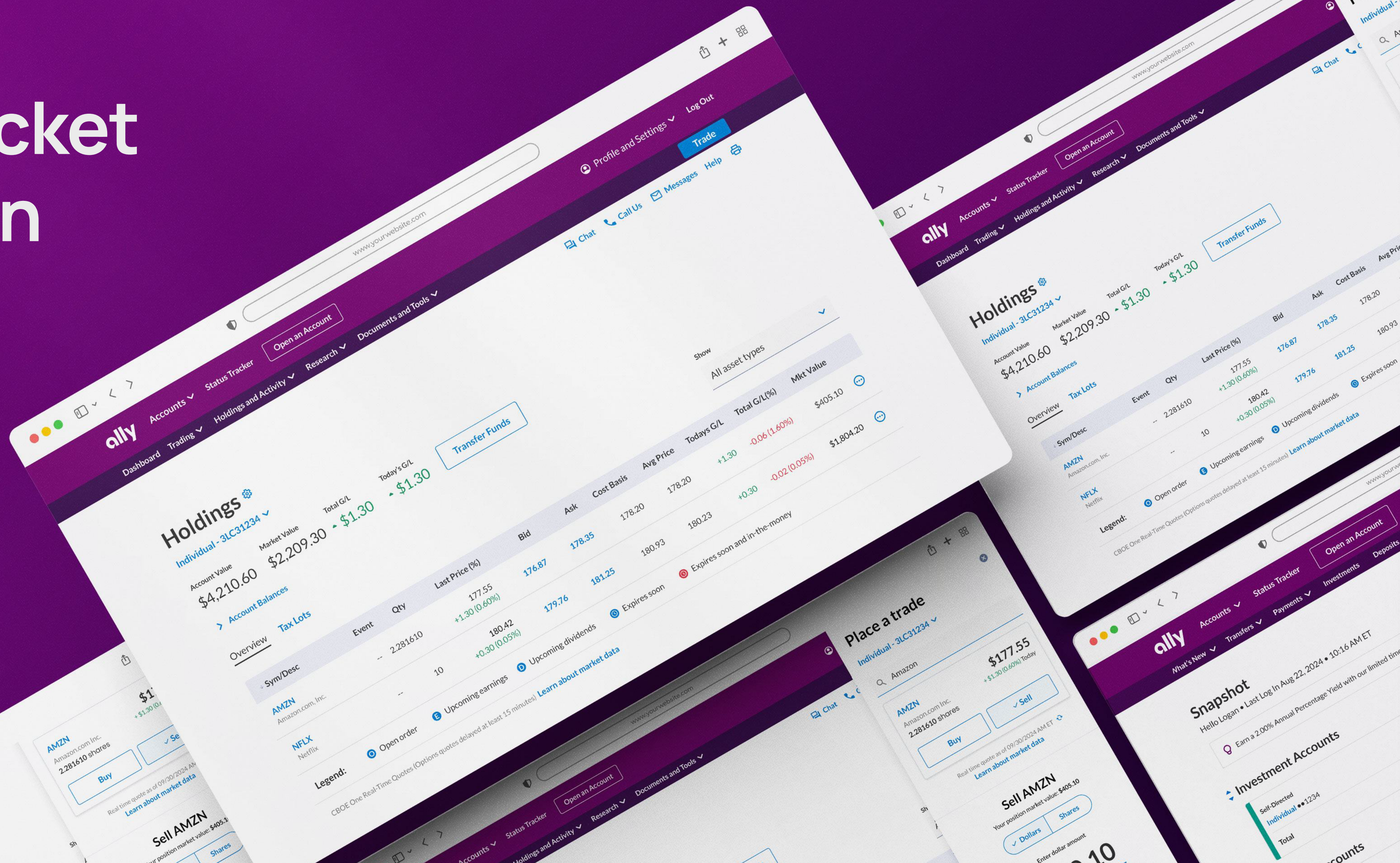
01

Trade Ticket Redesign

PROJECT TYPE

UX + UI Design

Web and Mobile Web



Problem To Solve

No Popular Features

Don't have the ability to trade in dollars or do Fractional trading.

No Parity

Lack of mobile and web parity, specially around buying power terminology.

Complex experience

The trading experience is very complex and overwhelming for a novice investor.

New Trading Panel

- Update UI patterns and Accessibility standard for a more consistent and modern look.
- Reduced number of data point and fields necessary for basic trading actions.
- Improved focus on quantity and primary actions

×

Place a trade

Individual - 3LC31234 ▾

Q Amazon

AMZN

Amazon.com Inc.

0.281610 shares

\$177.55

+ \$1.30 (0.60%) Today

✓ Buy

Sell

Real time quote as of 09/30/2024 AM ET ↻
[Learn about market data](#)

Buy AMZN

✓ Dollars Shares

Enter amount

\$0

Place a trade

Individual - 3LC31234

Amazon

AMZN

Amazon.com Inc.

0.281610 shares

\$177.55

+ \$1.30 (0.60%) Today

Buy

Sell

Real time quote as of 09/30/2024 AM ET

Learn about market data

Buy AMZN

Dollars

Shares

Enter amount

\$0

Buy AMZN

Dollars

Shares

Quantity

2

Order type

Market

Available to trade

\$1,951.30

Estimated total

\$355.10

Preview Order

Clear

Options trading

Apply for Options trading.

Selling

AMZN

Amazon.com, Inc.

\$177.55

+ 1.30 (0.60%)

Market info

Bid

\$176.87 x 1

Ask

\$178.35 x 1

Volume

15.47 M

Real time quote as of 09/30/2024 AM ET

Learn about market data

Quantity

1 Shares

Order type

Market

Duration

Good for Day

Estimated fee

\$0.00

Estimated commission

\$0.00

Estimated credit

\$177.55

Edit

Cancel

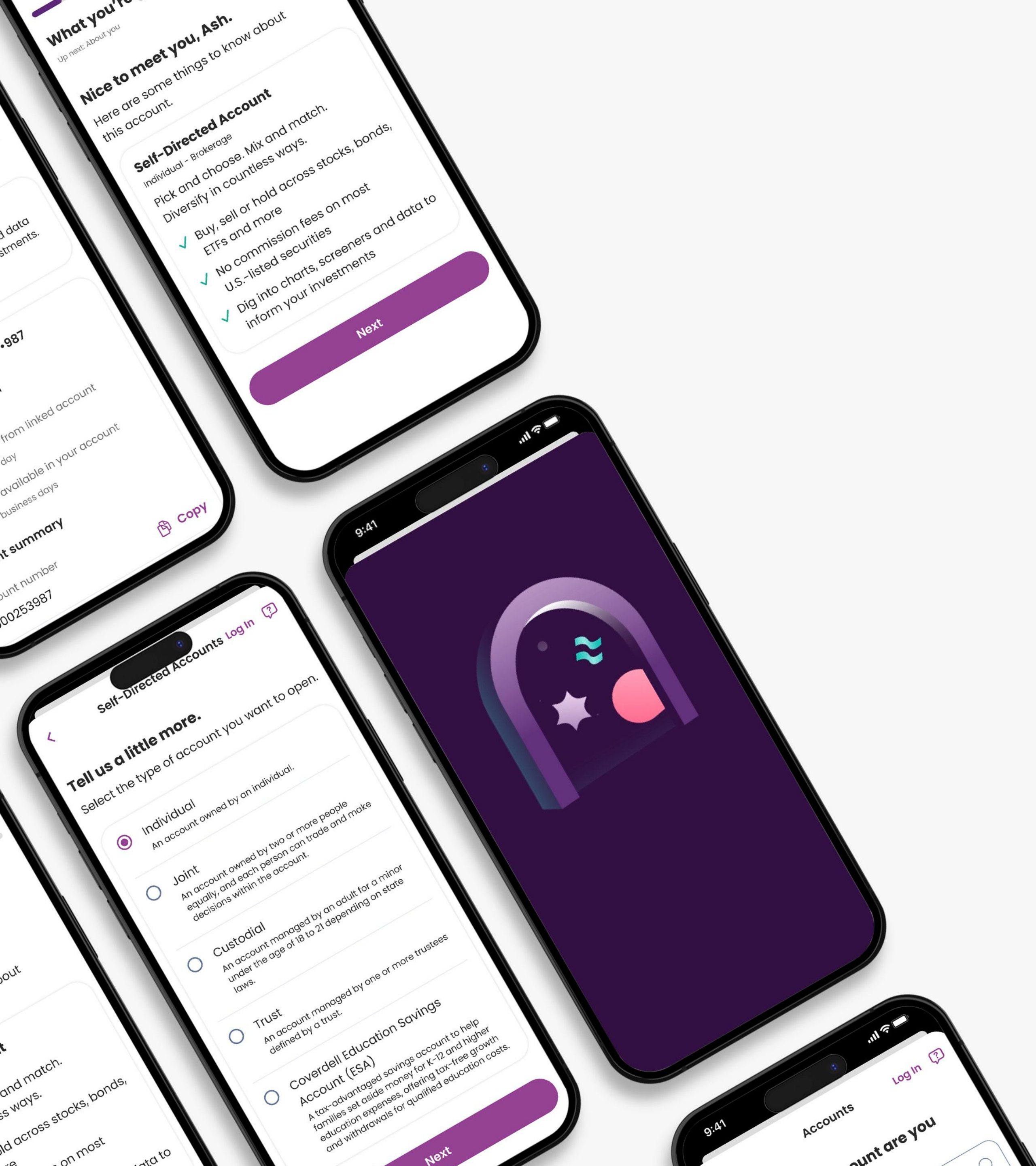
02

Invest Account Opening

PROJECT TYPE

UX + UI Design

Mobile App



Problem To Solve

Legacy Platforms

OLA uses Angular for Robo and Self Directed account opening.

No Native App

Currently there is no app flow for customers supporting Invest account opening.

Complex Sequencing

The current sequencing of questions and flow for Invest account opening is outdated and complex.

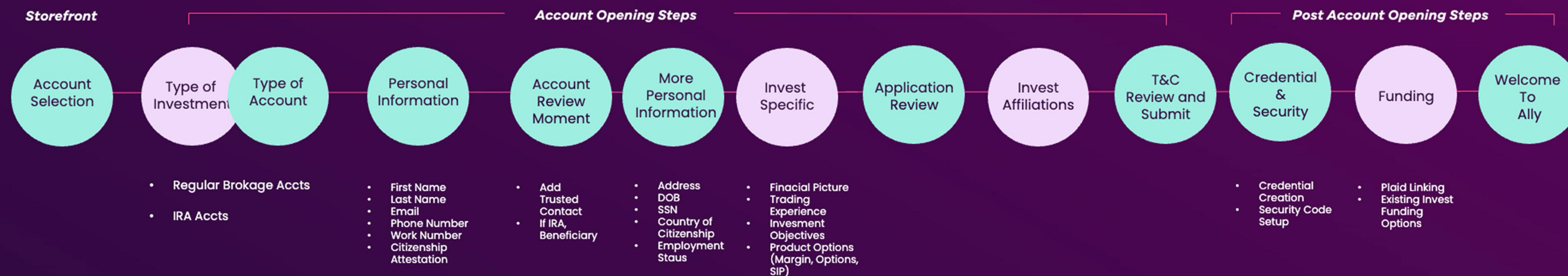
Flow

This is going to be for App and Web

High-level task flow

● Steps Mirroring AO for Deposit

● Invest Specific Steps



Updated sequencing and flow for account opening.

Accounts

Log In

?

What type of account are you opening?

Investing

Wide range of stocks, ETFs, options and futures on your own terms, with no restrictions on most U.S.-listed securities and no minimums to get started.

Retirement

Enjoy varying tax advantages and flexibility over your long-term savings by investing in a variety of assets like stocks and ETFs through a Traditional Retirement Account, or IRA.

Next

1. STEP

9:41

Self-Directed Accounts

Log In

?

Tell us a little more.

Select the type of account you want to open.

☒

Individual

An account owned by an individual.

☐

Joint

An account owned by two or more people equally, and each person can trade and make decisions within the account.

☐

Custodial

An account managed by an adult for a minor under the age of 18 to 21 depending on state laws.

☐

Trust

An account managed by one or more trustees defined by a trust.

☐

Coverdell Education Savings Account (ESA)

A tax-advantaged savings account to help families set aside money for K-12 and higher education expenses, offering tax-free growth and withdrawals for qualified education costs.

2. STEP

9:41

Get Started

Log In

?

Introduce yourself.

Up next: Account info

We're glad you're here, and we can't wait to become your ally.

First name

Last name

Middle initial (optional)

Suffix (optional)

Email

Mobile number

Add another number

3. STEP

Account Info

?

What you're getting.

Up next: About you

Nice to meet you, Ash.

Here are some things to know about this account.

Self-Directed Account

Individual - Brokerage

Pick and choose. Mix and match. Diversify in countless ways.

✓ Buy, sell or hold across stocks, bonds, ETFs and more

✓ No commission fees on most U.S.-listed securities

✓ Dig into charts, screeners and data to inform your investments

Next

4. STEP

9:41

Investment Objectives

?

Tell us about your investment objectives.

Up next: Your trading experience

Now, for this account, think about your financial goals and comfort level, and pick the investment objective that makes the most sense for you. This is your initial objective, but you can change it down the road as your goals evolve.

Medium risk tolerance

Growth and Income

A balance between earning regular income in your account and potentially growing your account's value over time by investing in riskier assets.

Growth

To aim to grow your account's value over time by investing in assets typically associated with increased risks.

Lower risk tolerance

5. STEP

9:41

Review Details

?

Give your info one last look.

Up next: Potential affiliations

Make sure everything's just right.

Your info.

Name

Ash D. Smith III

Email

ashsmith@email.com

Mobile phone

680-555-7865

Home address

1234 E Main St
Scottsdale, AZ 85251
United States

Edit Info

6. STEP

9:41

Add Money

?

Pick a funding method.

Up next: Confirmation

Choose how you want to add money to your account — there's no minimum.

Link an outside bank

Securely connect an outside bank to transfer funds electronically into your new account.

Link External Account

Move investments from another brokerage

Transfer and consolidate your investments like stocks, ETFs or mutual funds from another firm.

Move Investments

Looking for more ways to fund your account?

7. STEP

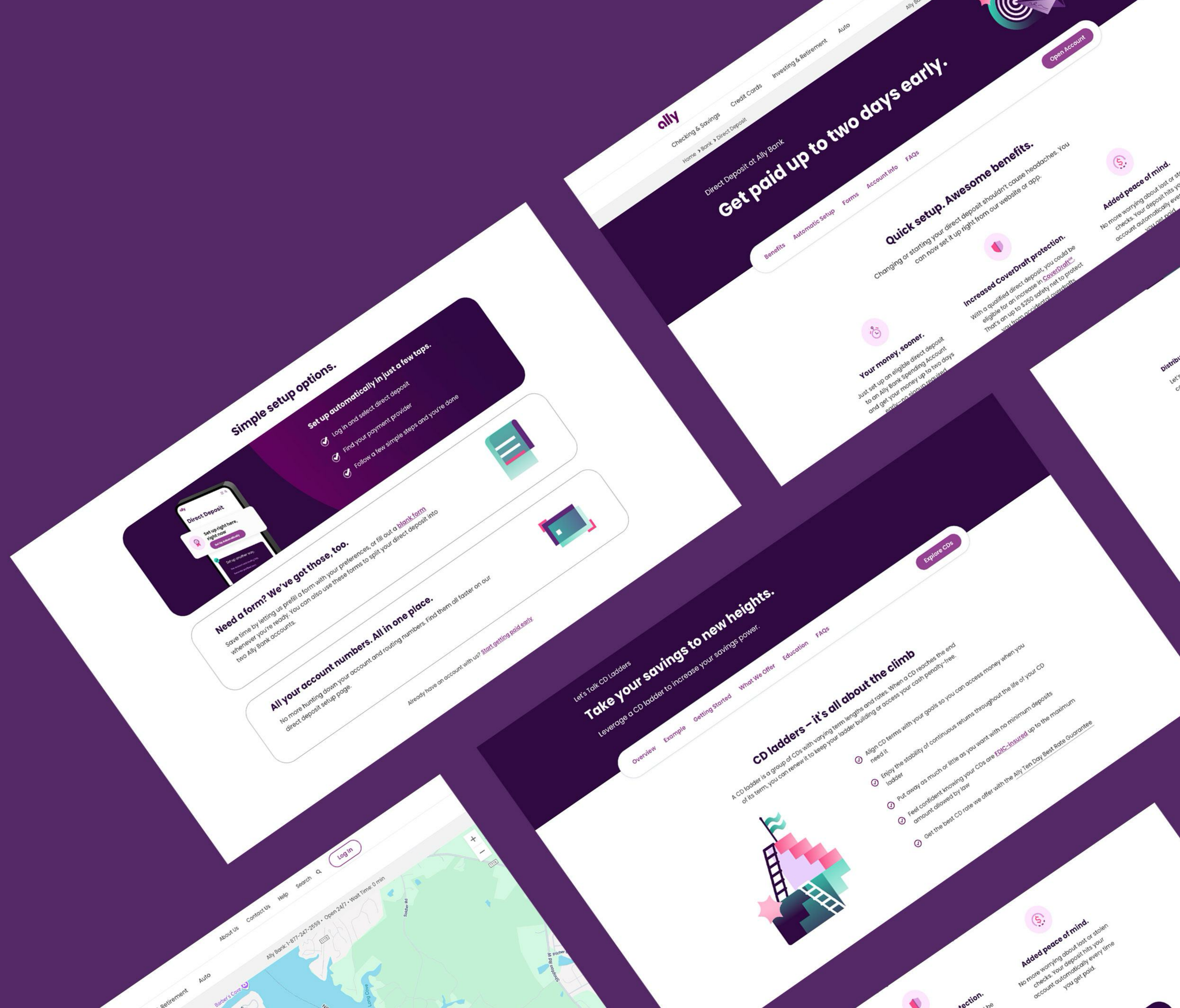
03

Ally Storefront

PROJECT TYPE

UX + UI Design

Web

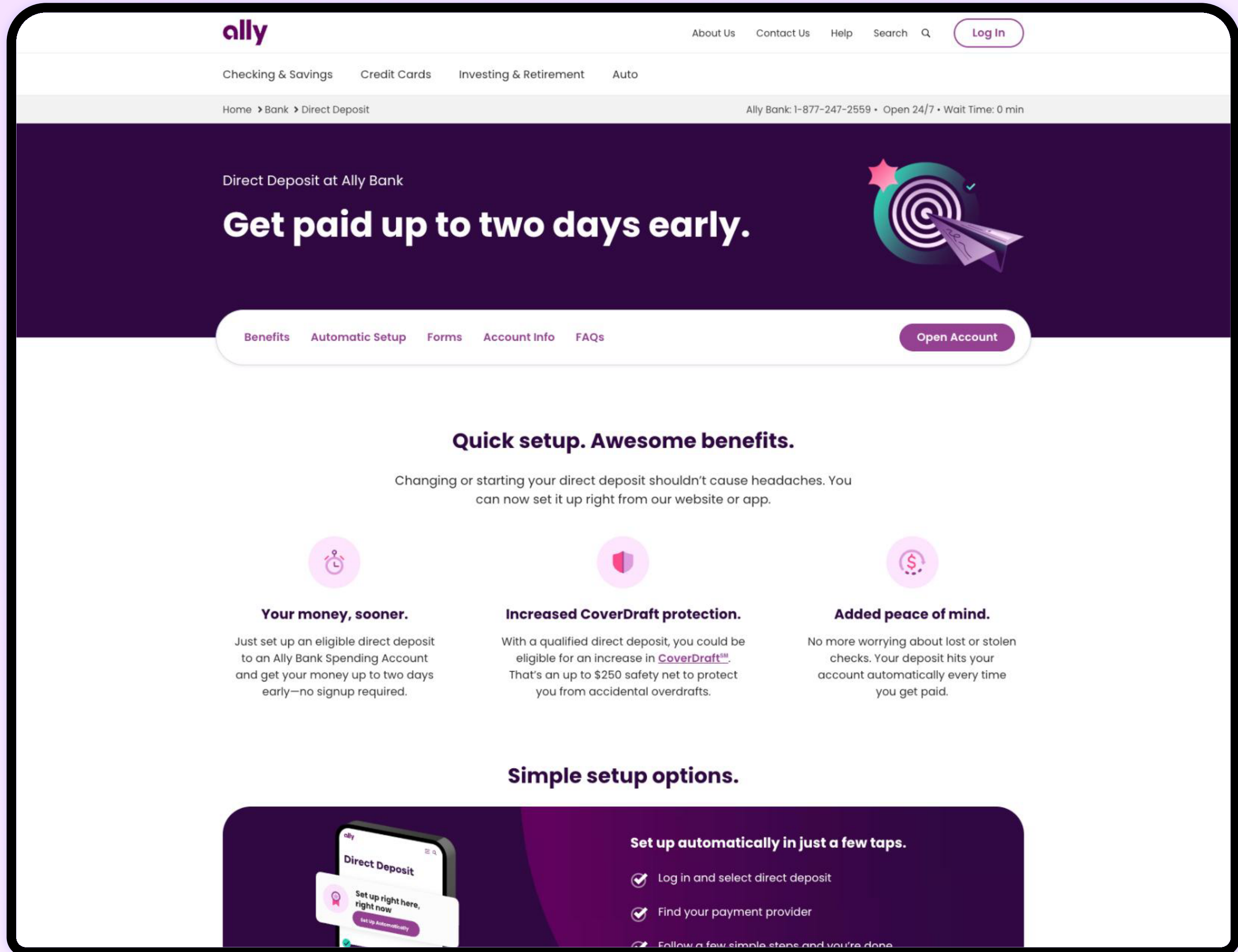


03

Direct Deposit

This page introduces Ally Bank’s Direct Deposit feature, which allows customers to receive their paychecks up to two days early. The experience is fully digital—users can log in, access their account details, and set up direct deposit through a simple, step-by-step process. The page highlights key benefits like early access to funds, automatic deposits, and added overdraft protection with qualifying deposits. It also includes helpful FAQs and guidance for first-time users.

[Link to page](#)



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Q

Log In

[Checking & Savings](#)[Credit Cards](#)[Investing & Retirement](#)[Auto](#)

Ally Home

Ally Bank: 1-877-247-2559 • Open 24/7 • Wait Time: 0 min

Let's Talk CD Ladders

Take your savings to new heights.

Leverage a CD ladder to increase your savings power.

OverviewExampleGetting StartedWhat We OfferEducationFAQs

Explore CDs

CD ladders – it's all about the climb

A CD ladder is a group of CDs with varying term lengths and rates. When a CD reaches the end of its term, you can renew it to keep your ladder building or access your cash penalty-free.



✓ Align CD terms with your goals so you can access money when you need it

✓ Enjoy the stability of continuous returns throughout the life of your CD ladder

✓ Put away as much or little as you want with no minimum deposits

✓ Feel confident knowing your CDs are **FDIC-insured** up to the maximum amount allowed by law

✓ Get the best CD rate we offer with the Ally Ten Day Best Rate Guarantee

Breaking down a CD ladder.

Distribute your money

Let's say you have \$3,000 you want to put into a CD ladder. You can distribute that money evenly across three different CDs:

Year 0

Year 5

3-year

03

CD Ladders

This page introduces CD laddering as a savings strategy that enables users to earn competitive interest while maintaining access to their funds over time. It explains the concept in simple terms and walks users through setting up a ladder by choosing the number of CDs, terms, and how they'd like their funds handled at maturity. The page also highlights Ally's CD options and includes FAQs for extra guidance.

[Link to page](#)

Thank you

Interested in working together or learning more? Let's connect.



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