

# Welcome!











## Not a member yet? Sign up here.



Account creation - 1



# Create your account

# First name

Last Name

Email address

Password

Confirm password

By creating your account, you agree to our Terms & Conditions and Privacy Policy



Account creation - decision



# Hello!

# The first step to create your account is to let us know how we can help you.

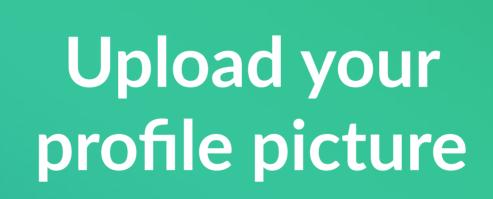
# I am looking for a Financial Advisor

## I am a Financial Advisor

Account creation 2 - client



We just need a few more details...





# Date of birth

Nationality

# Phone number

Address

City

Postal code

# Create my account







# Hi %First Name%!

Hatch AI will help you

connect to a Financial Advisor that matches your needs.

# Once you select one or a few advisors, you can then book a meeting, etc.

Let's start by selecting a Financial Advisor.

# Search for a Financial Advisor

#### I'd rather go to my homepage now

Client - view FA profile





# Suggested Advisor



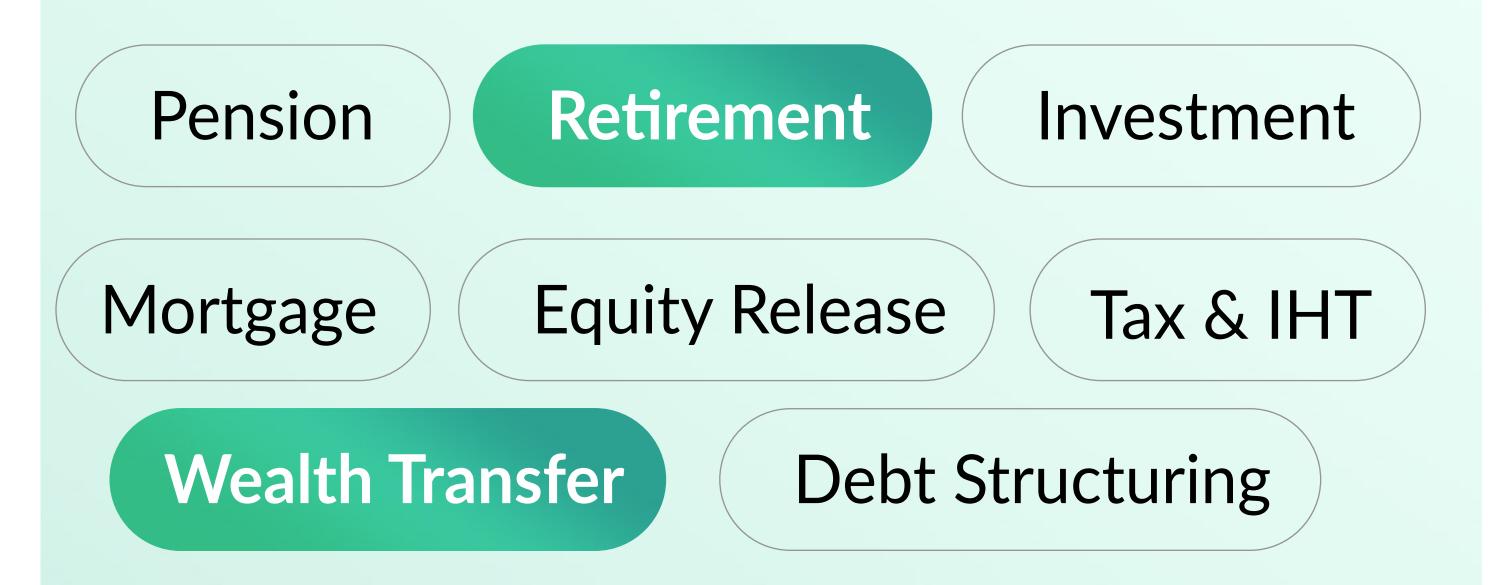
# John Smithe

Financial Capital Inc. FCA #12345678

123 High Street,



# Type of financial advice



#### About me

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## My experience

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#### Location



# Book a meeting

Home - client - no meetings





# Search for a Financial Advisor

# Your Financial Advisors



#### View the full list of my Advisors



# You have no upcoming meetings

### **Book a meeting**

Home - client - with meetings





#### Search for a Financial Advisor

# Your Financial Advisors



#### View the full list of my Advisors





# Your next meeting

# 04 September 2018 at 15:30



Sandra Bloddel Garricks Finacials

# View or book meetings



Home - client - at meeting time





#### Search for a Financial Advisor

# Your Financial Advisors



#### View the full list of my Advisors





# It is time for your meeting 04 September 2018 at 15:30



Sandra Bloddel Garricks Finacials

# Video call your advisor now







# Your Clients



#### View the full client list



# at 15:30

# With John Smithe

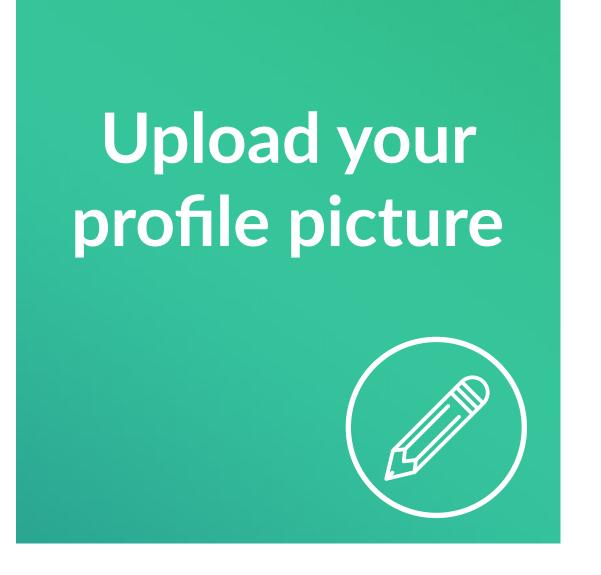
# View or edit meetings

Account creation 2 - FA



# Welcome to Hatch AI %First Name%,

Please create your public profile to get started.



## What is your company name?

What is your company FCA number?

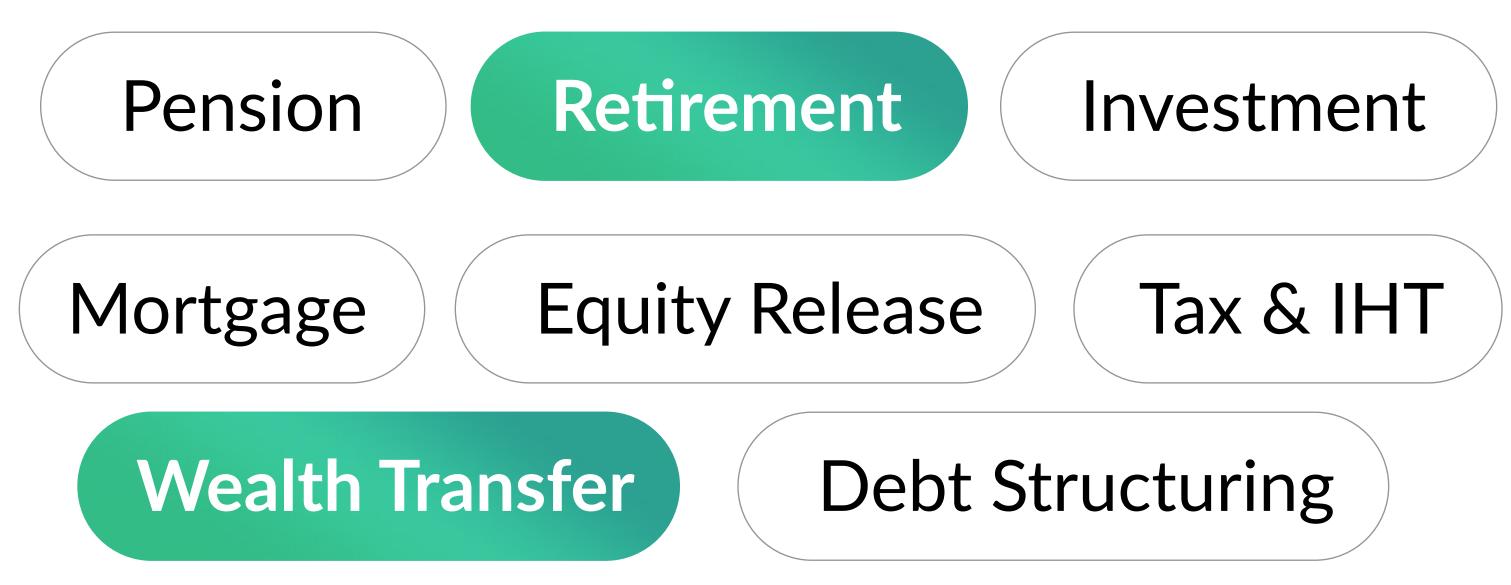
Please enter your location.

# Address



Postal code

# What type of financial advice do you offer?



Tell us about you (250 char. max.)

# Tell us about your experience (100 char. max.)

Create my account





# On the next screen, you can see a list of all your clients and you can manage your upcoming

# appointments.

If you haven't done so, we recommend you spend some time to fill up your profile and update it regularly. You can do so by clicking the icon in the top-right corner.

I got it! Take me to my home page.

FA - Client list





# Search client list

# Your Clients



# **John Smithe**

Other relevant info

Next meeting: Sept. 24 2018 at 10:30

# **Nicole Strutton**

Other relevant info

Next meeting: Sept. 24 2018 at 16:30



**Michael Iron** 



#### Other relevant info

#### No upcoming meeting

## **Stephan Docker**

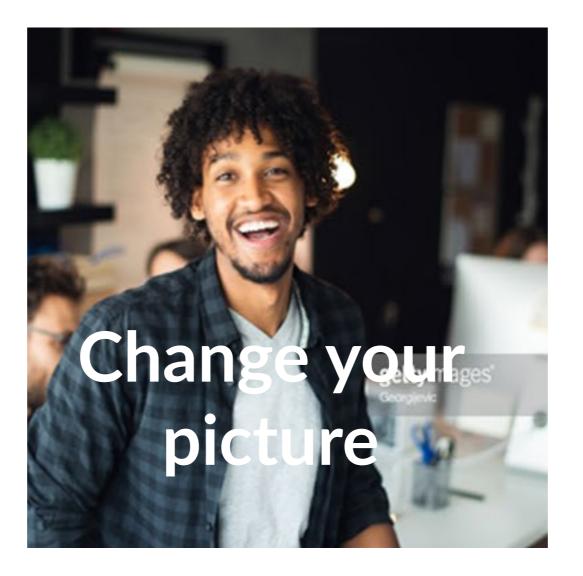
Other relevant info



Client - Edit profile







## First Name

John

Last Name

Smithe

Email address

jsmithe@financial.com

Change password

Phone Number

123 1234 1234

#### Date of Birth

12/12/1978

# Nationality

British

# Address

123 Main St.

City



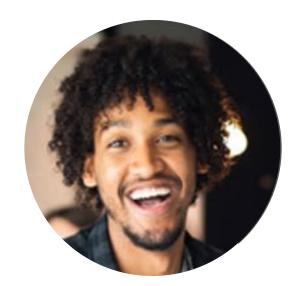
Manchester

Postal code

1234567

# Save my changes





# Your Profile





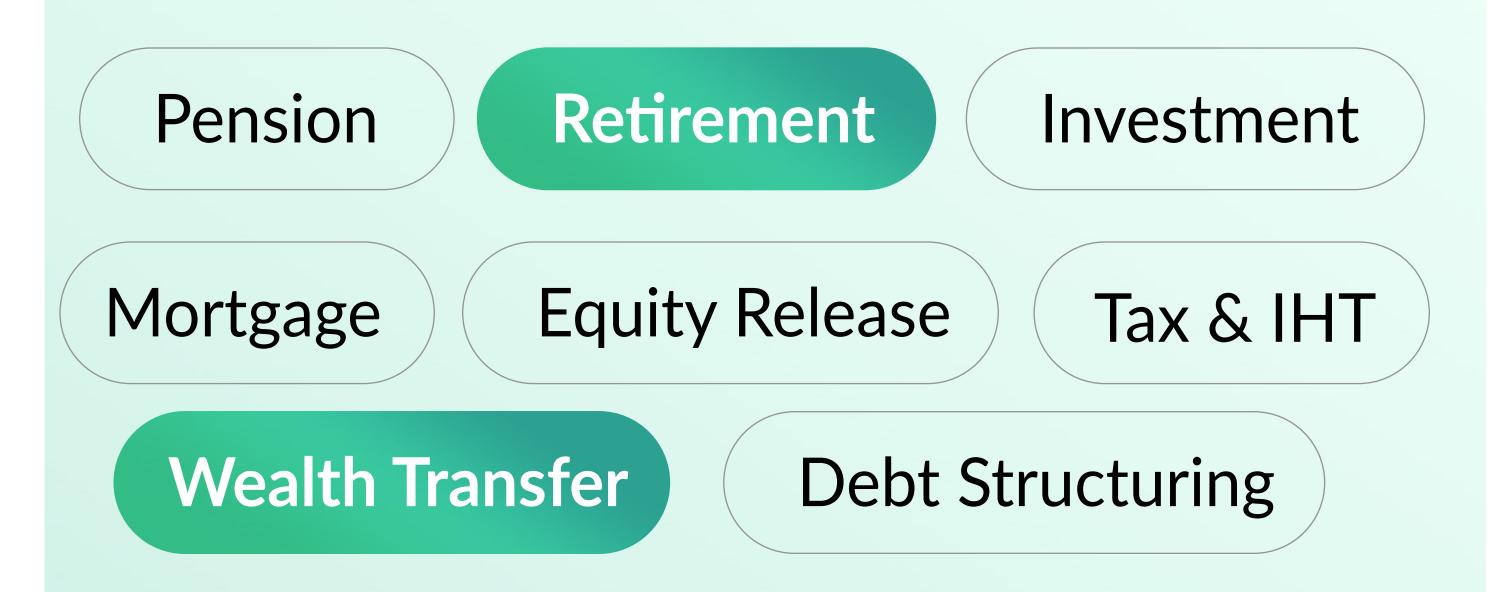
John Smithe

Financial Capital Inc. FCA #12345678

123 High Street,



# What type of financial advice do you offer?



#### About me

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## My experience

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# My location

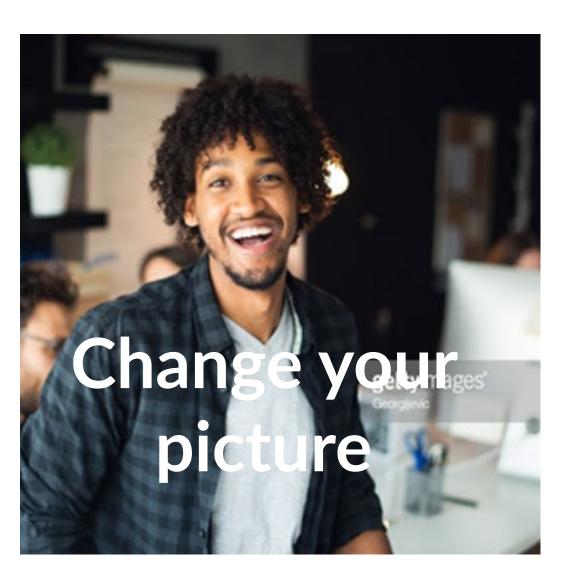


# Edit my profile









#### First Name

John

#### Last Name

Smithe

# Email address

jsmithe@financial.com

Change password

What is your company name?

Financial Capital Inc.

What is your company FCA number?

1234567

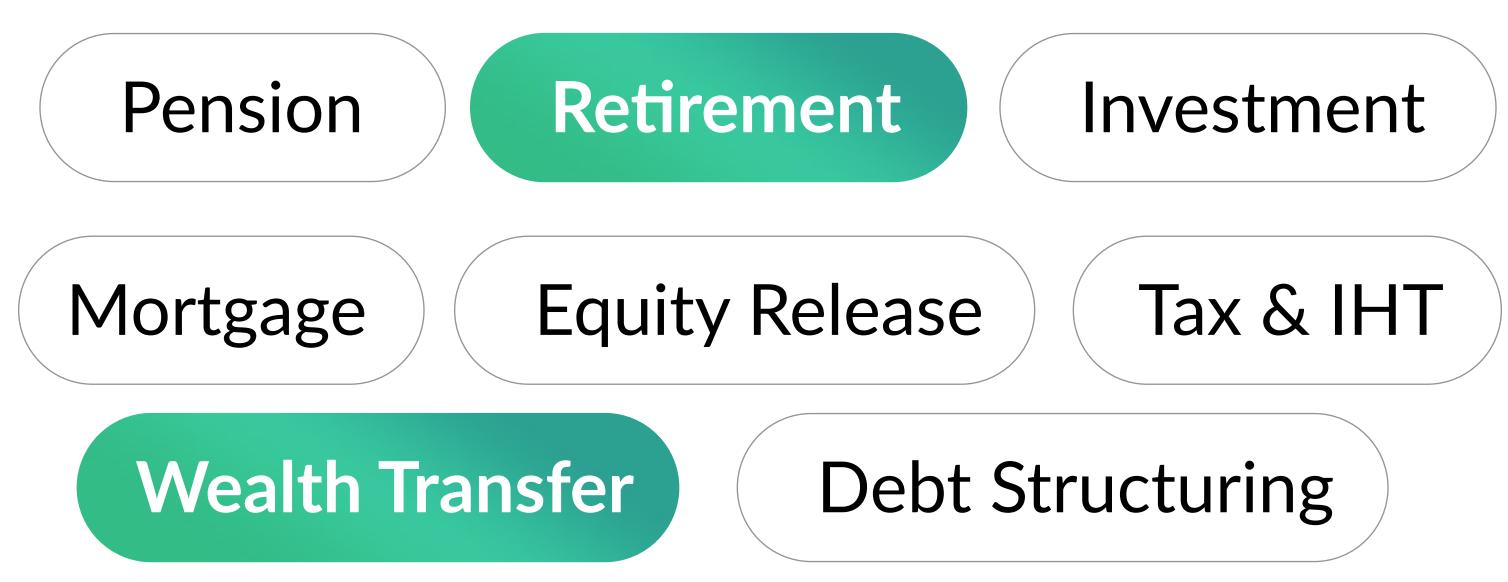
Please enter your location.



Manchester

1234567

# What type of financial advice do you offer?



Tell us about you (250 char. max.)

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Tell us about your experience (100 char. max.)

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