

Visual Style Guide for Charles Schwab EAC

1 Data Visualization

2 Dashboard Page

3 Award Details Page

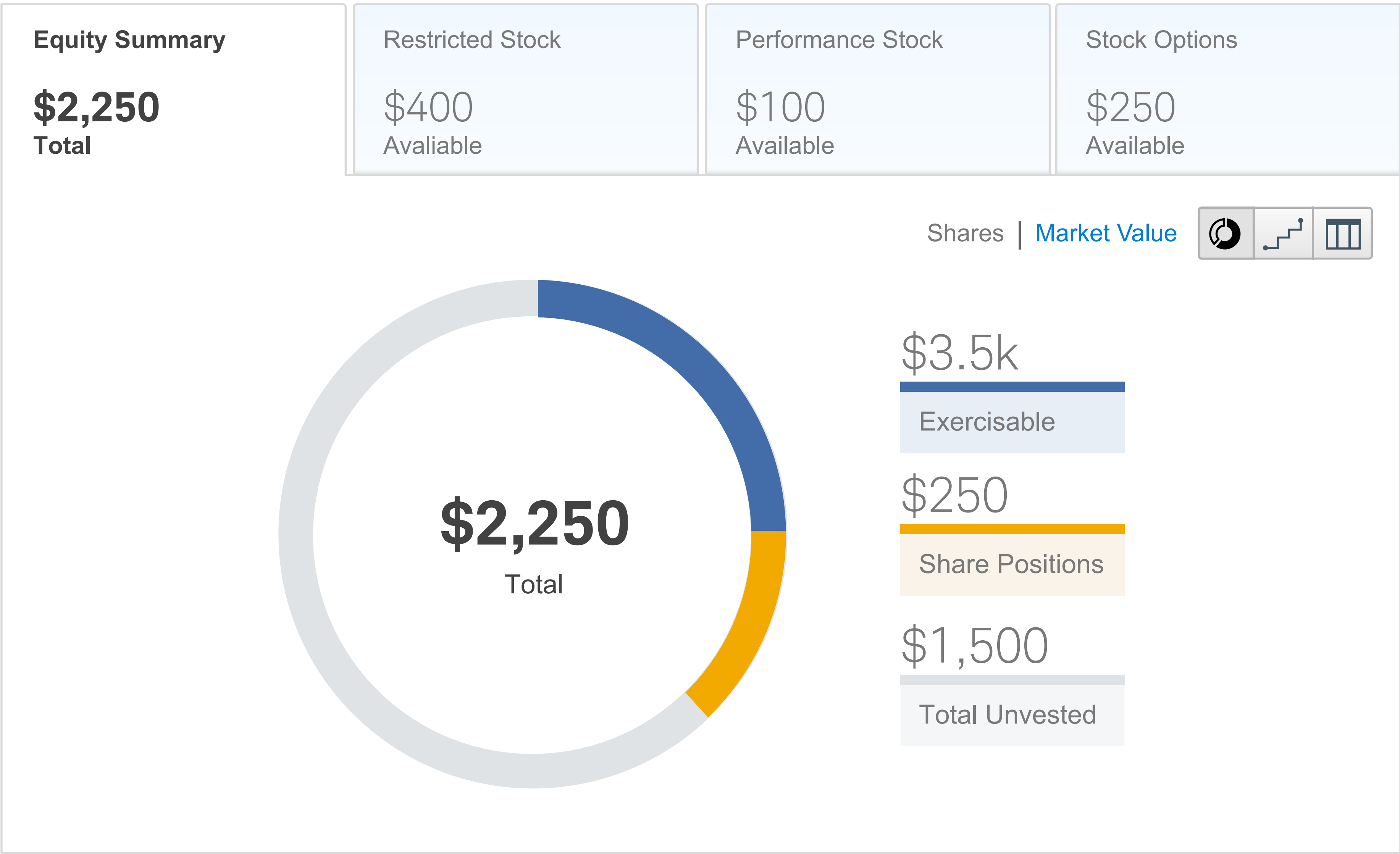
4 Style Guides

Data Visualization

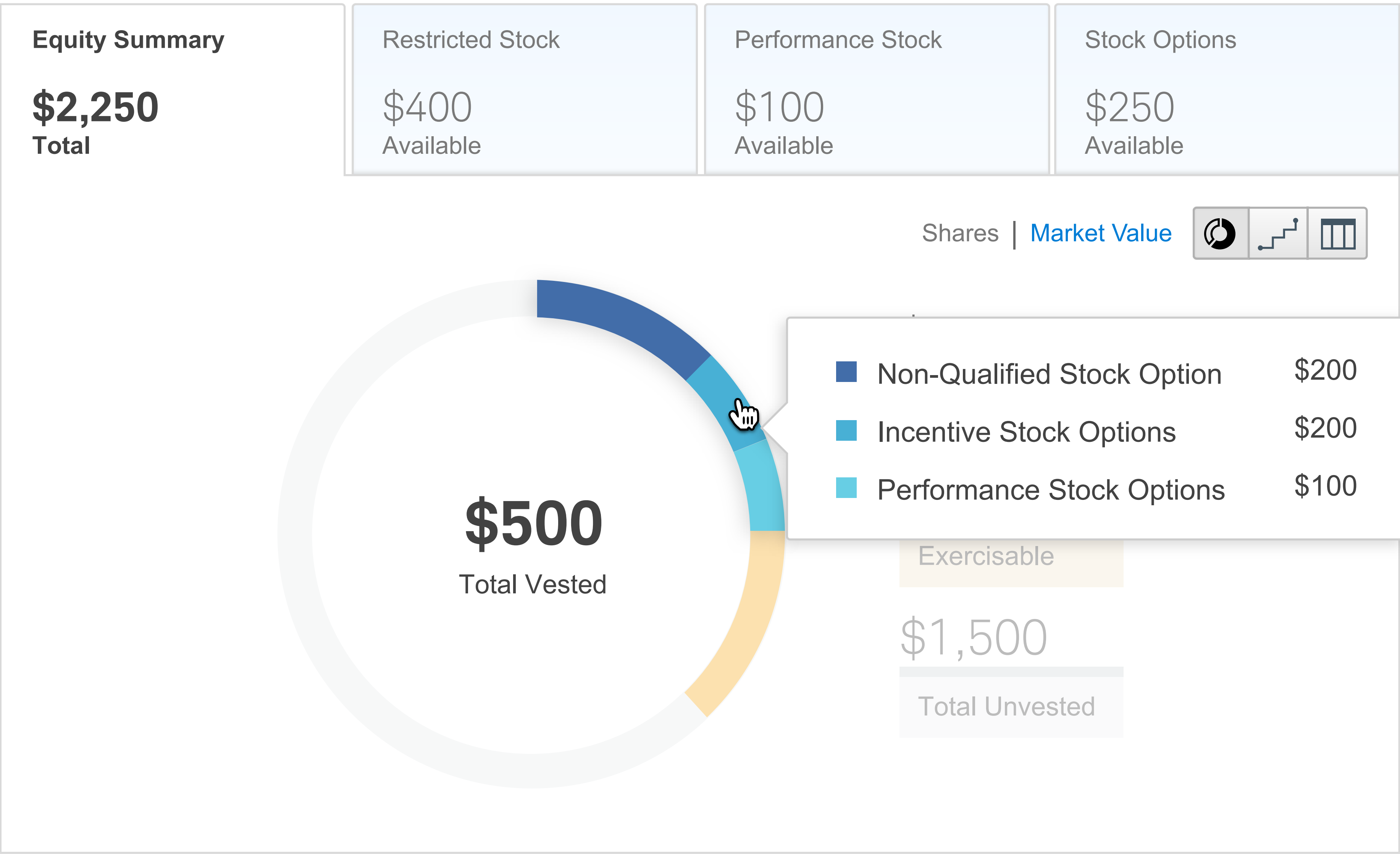
Data Visualization: Doughnut Chart

Doughnut chart appears in the EAC Equity Summary module

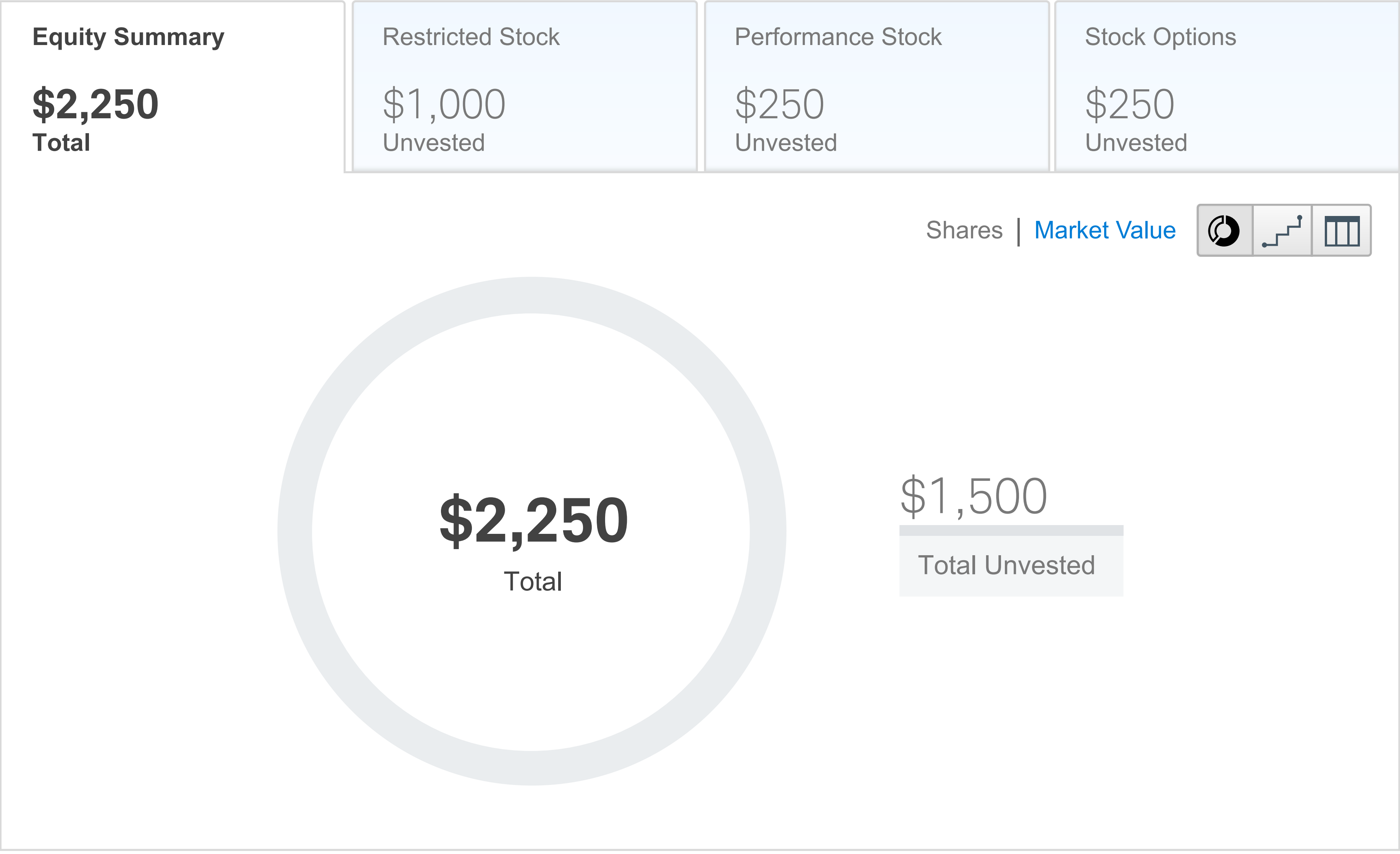
Pie Chart View



Hover State

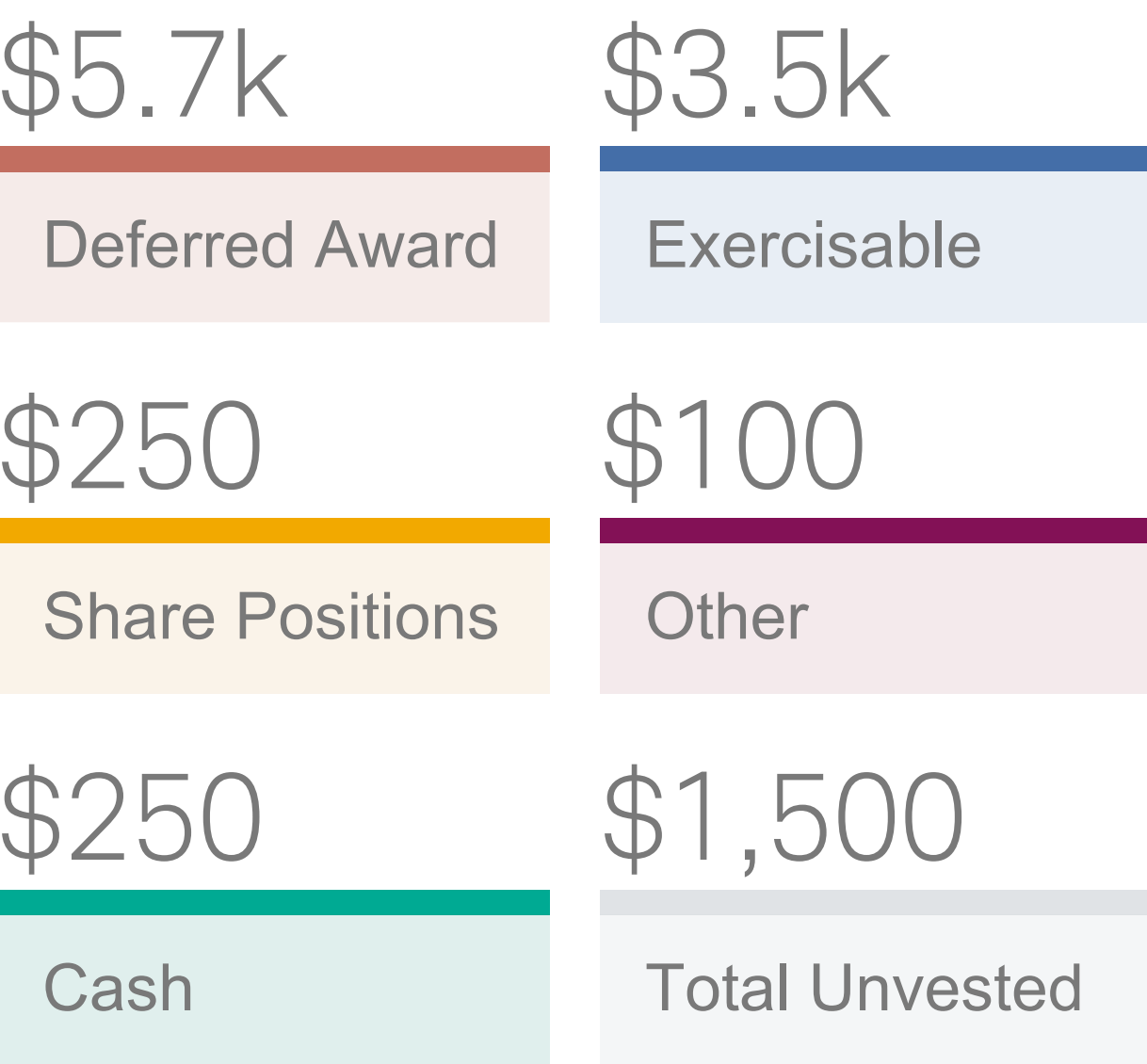


Zero State - Pie chart is disabled without multiple award types

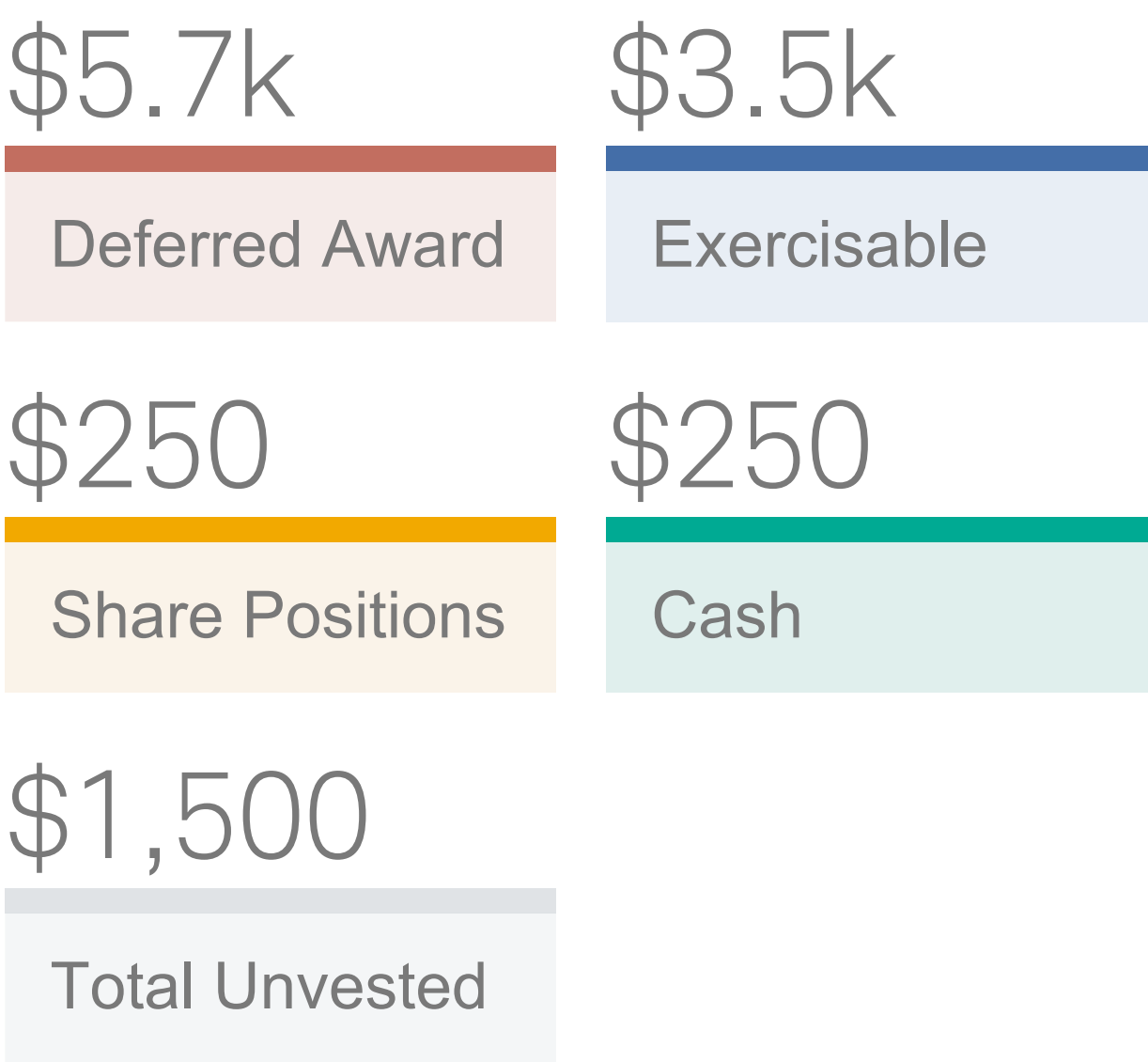


Pie Chart Legend

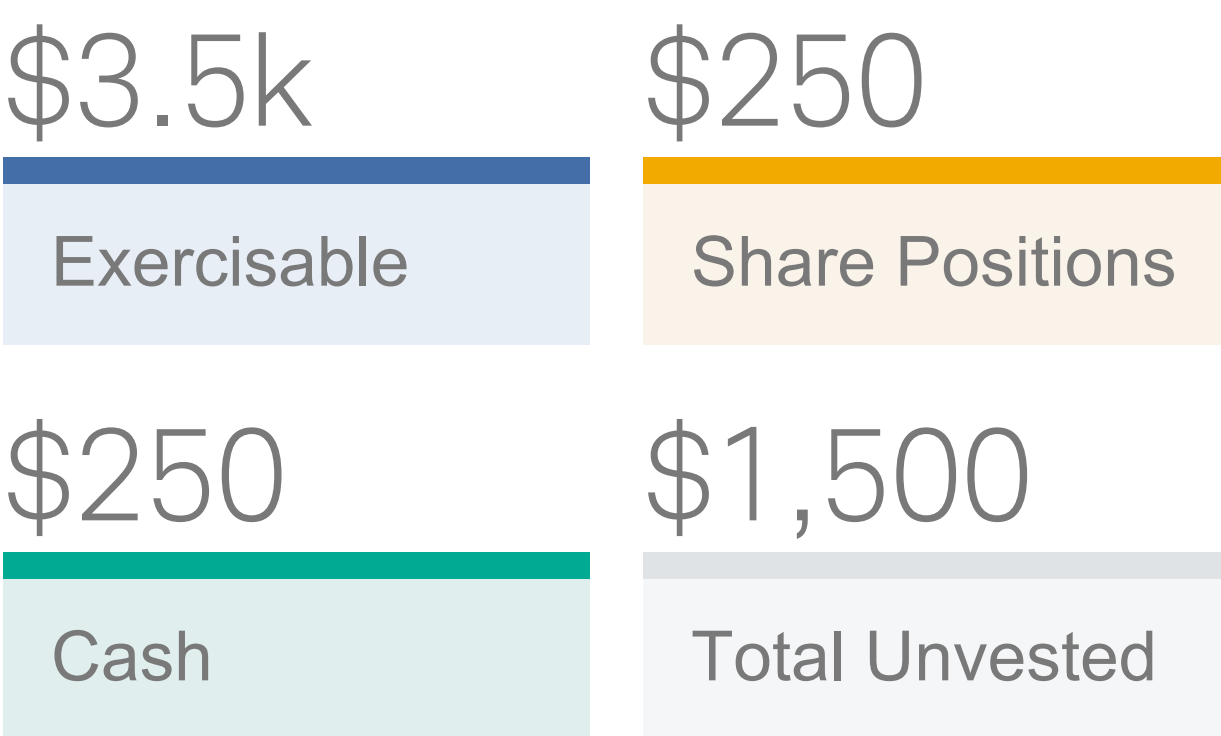
Max State - 6 ledgend items



5 ledgend items



4 ledgend items



3 ledgend items

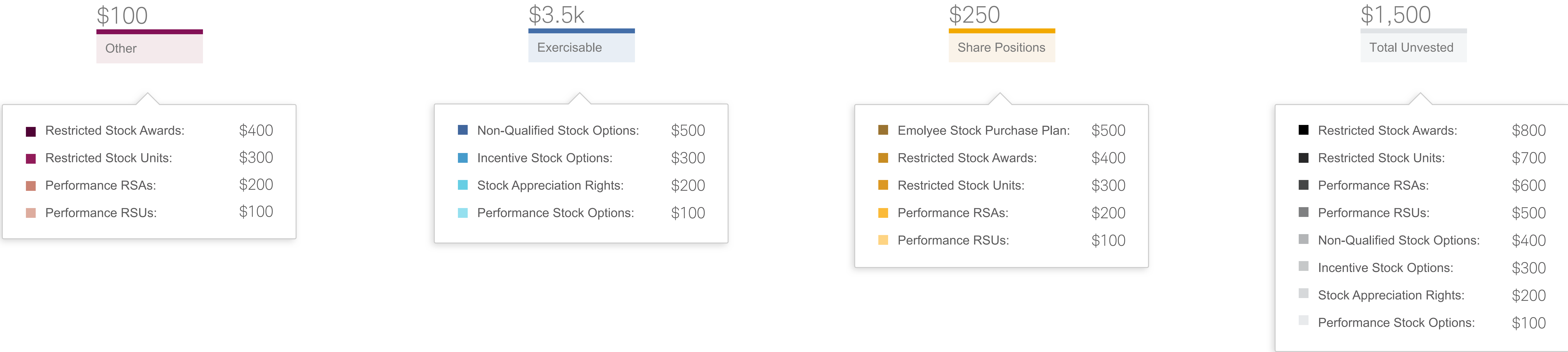


2 ledgend items

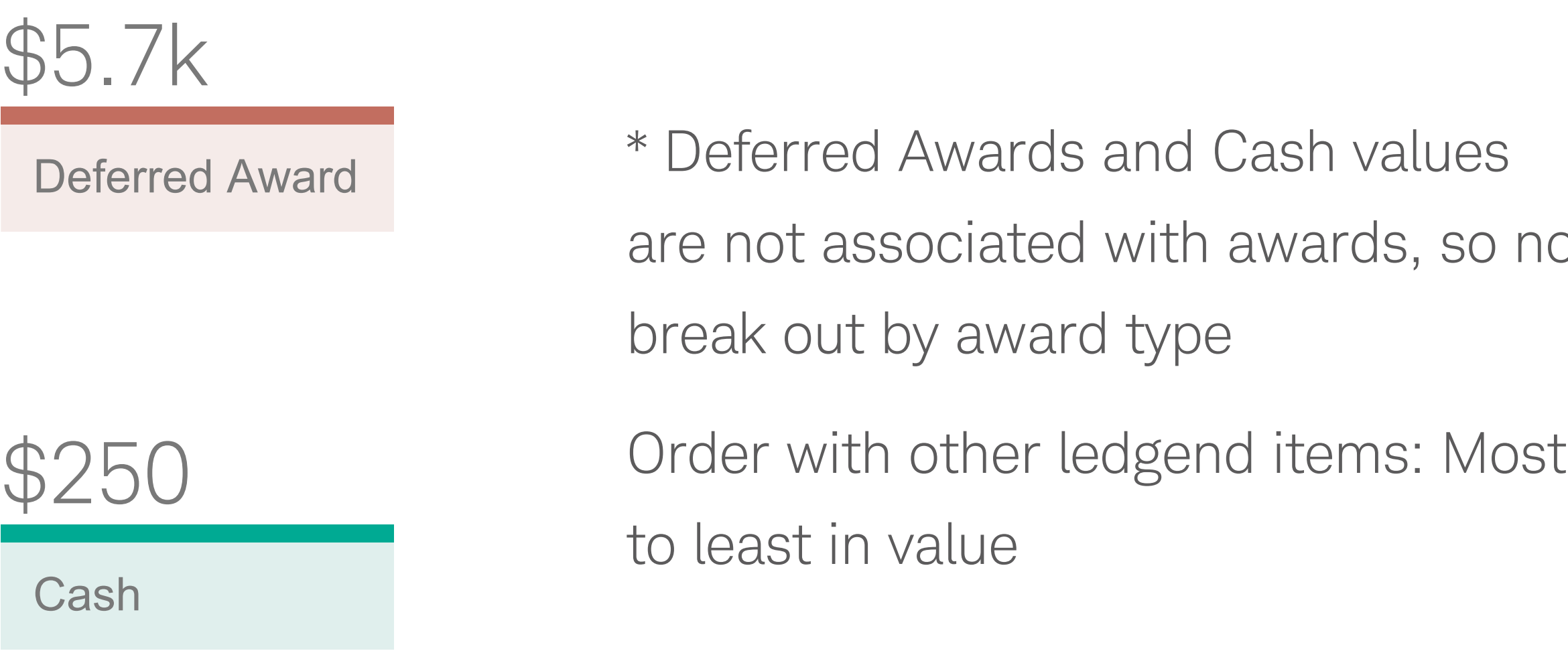


Pie Chart Legend

Break outs: Maxed out

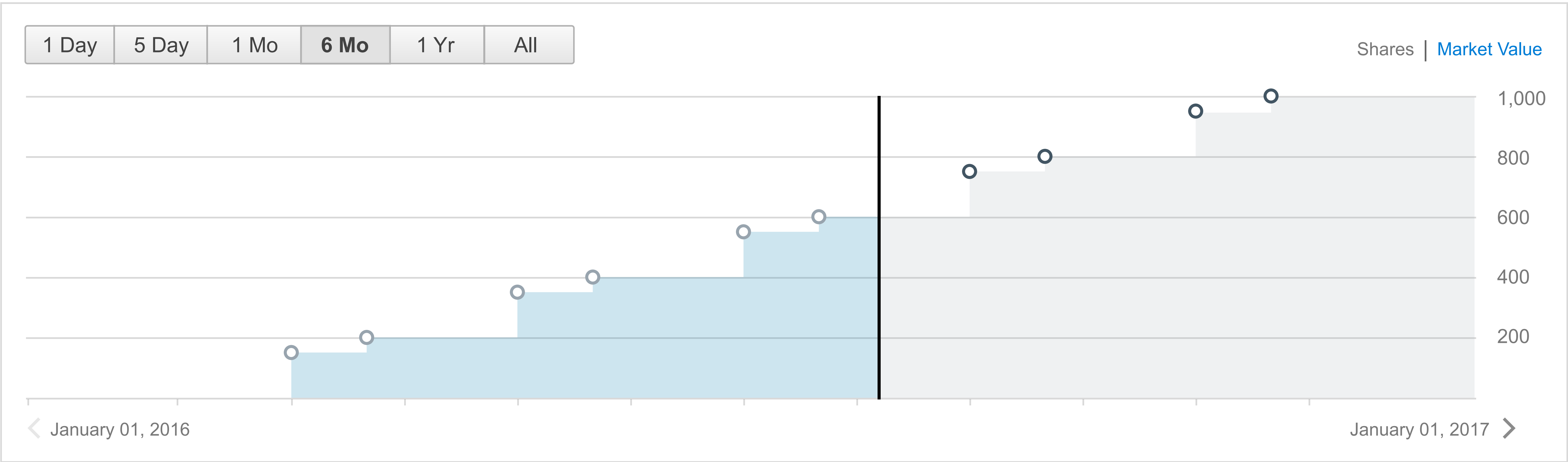


Stand alones

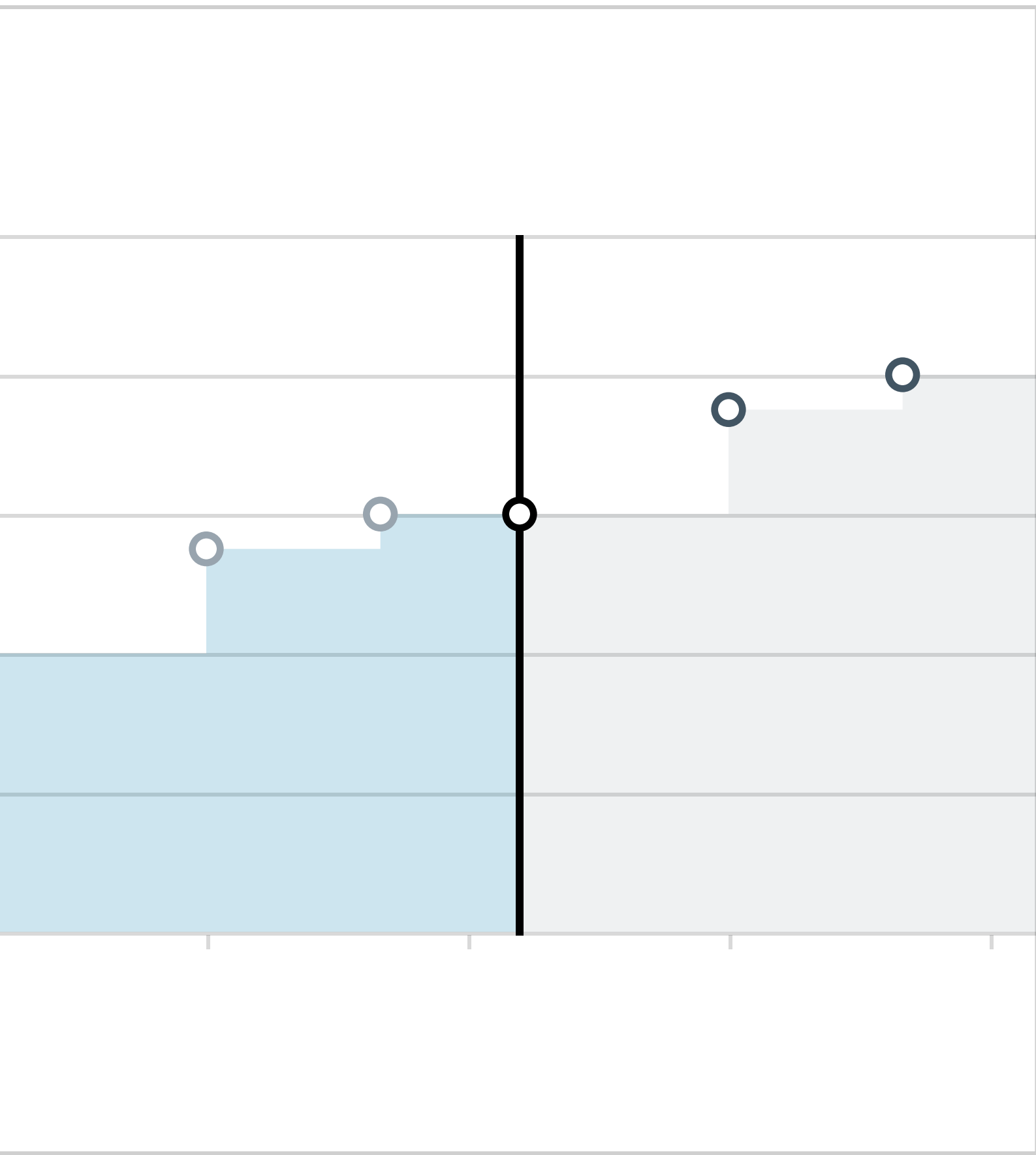


Data Visualization: Line Chart (Vesting Awards)

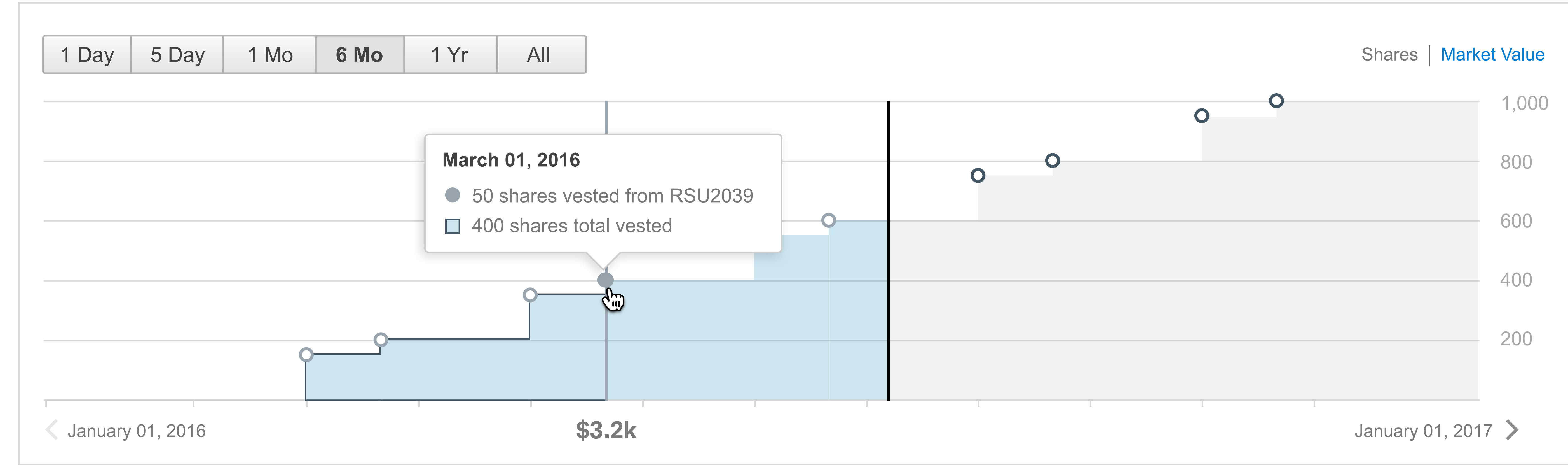
Line chart appears in the EAC Equity Summary module, the Award Details Data Visualization, and Vesting Awards Table expanded view
Chart reflects vest/purchase dates, does not reflect shares sold or options exercised



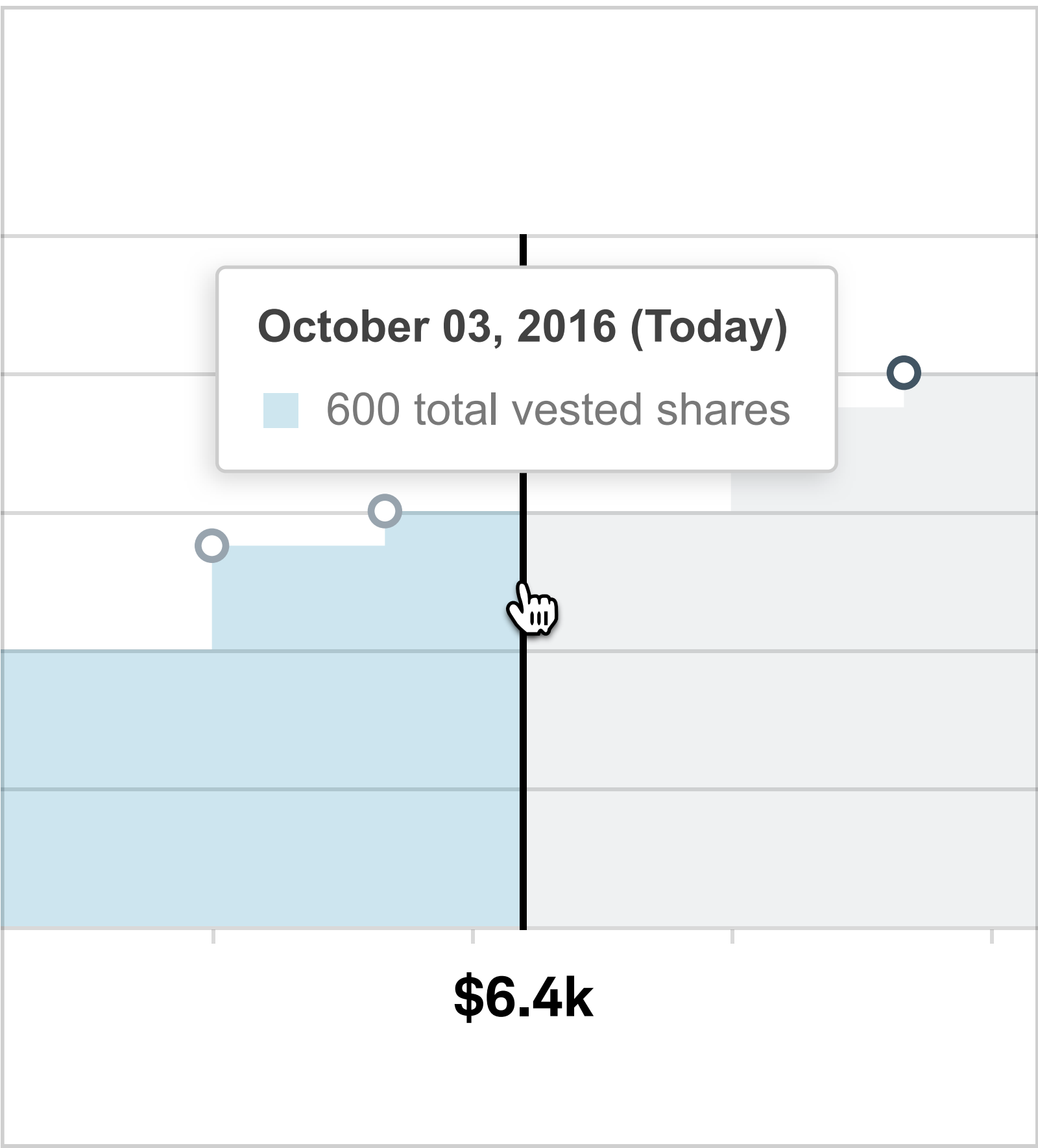
Activity on today



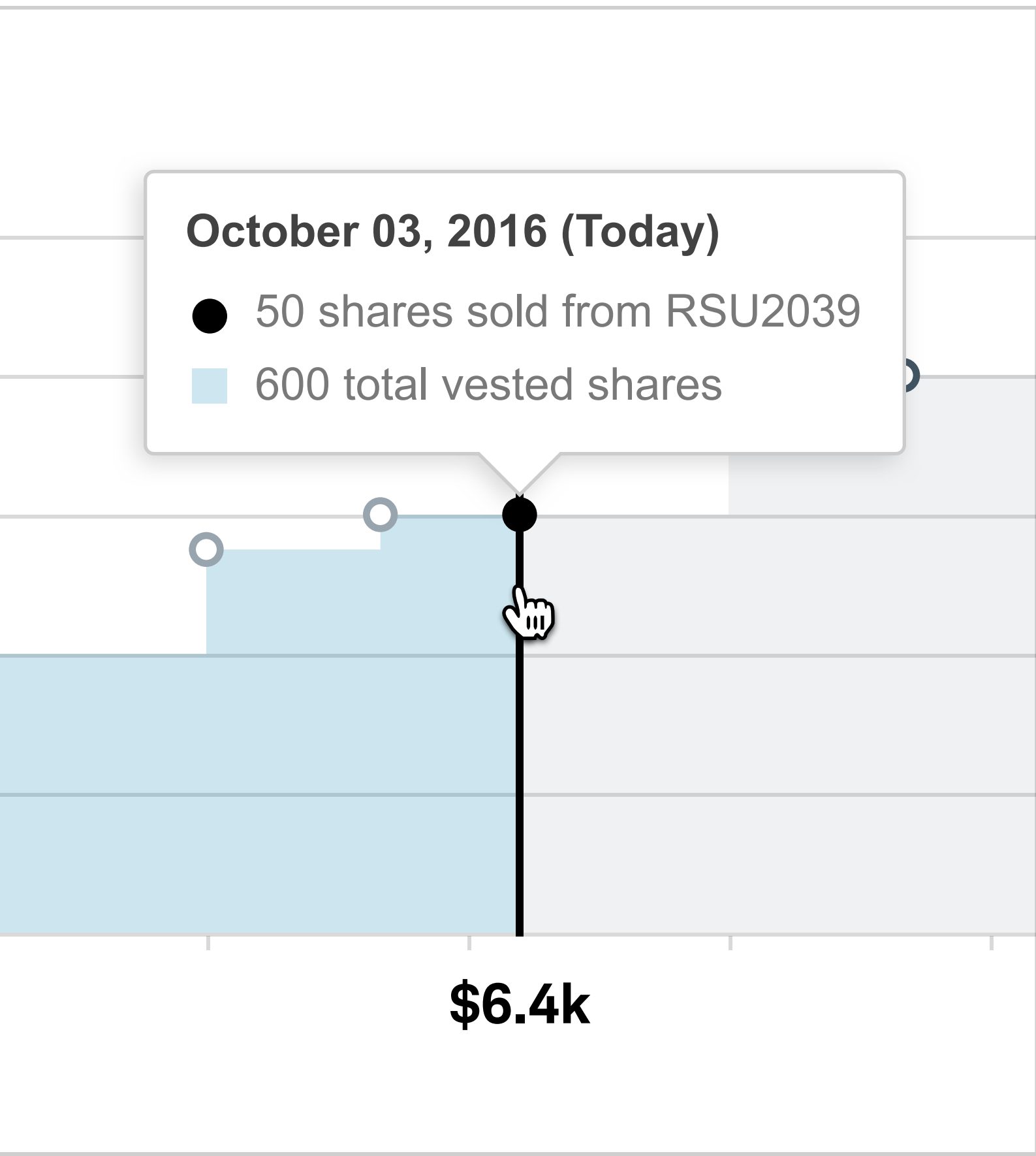
Hover (Past activity)



Hover Today

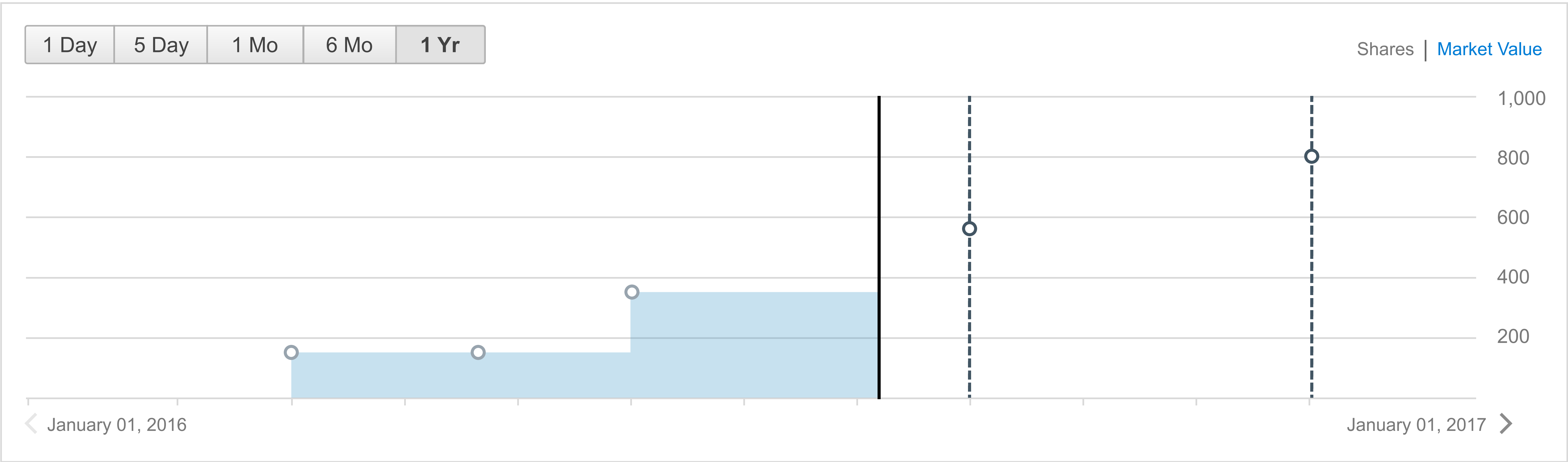


Hover (Activity on today)

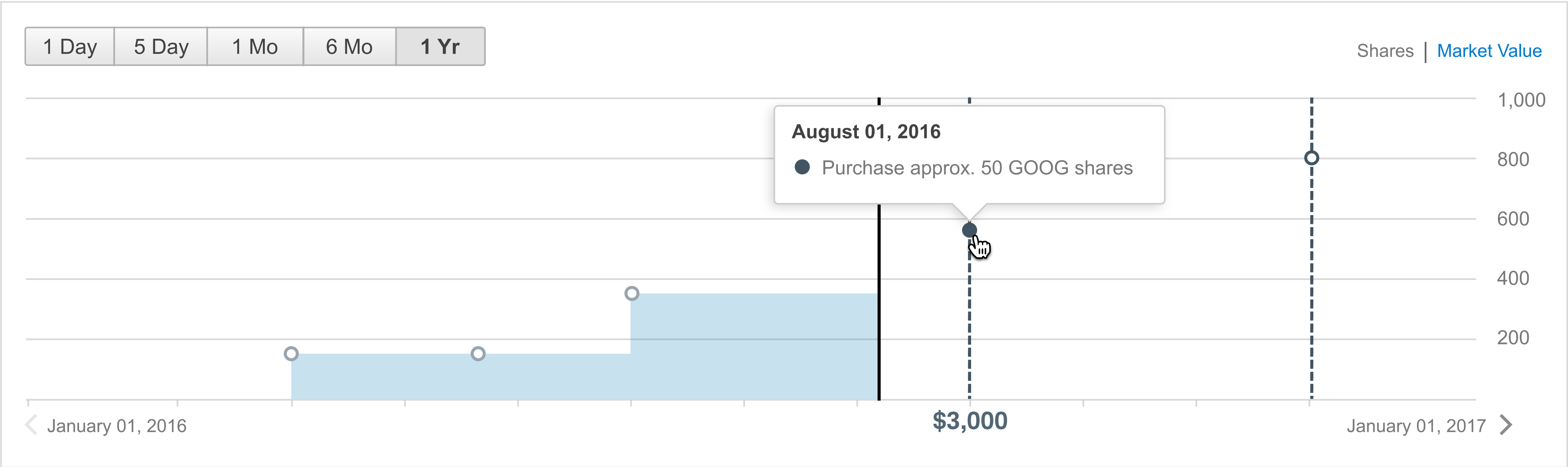


Use outline around “vested” item hovering on past vested totals (see above) or future vested totals

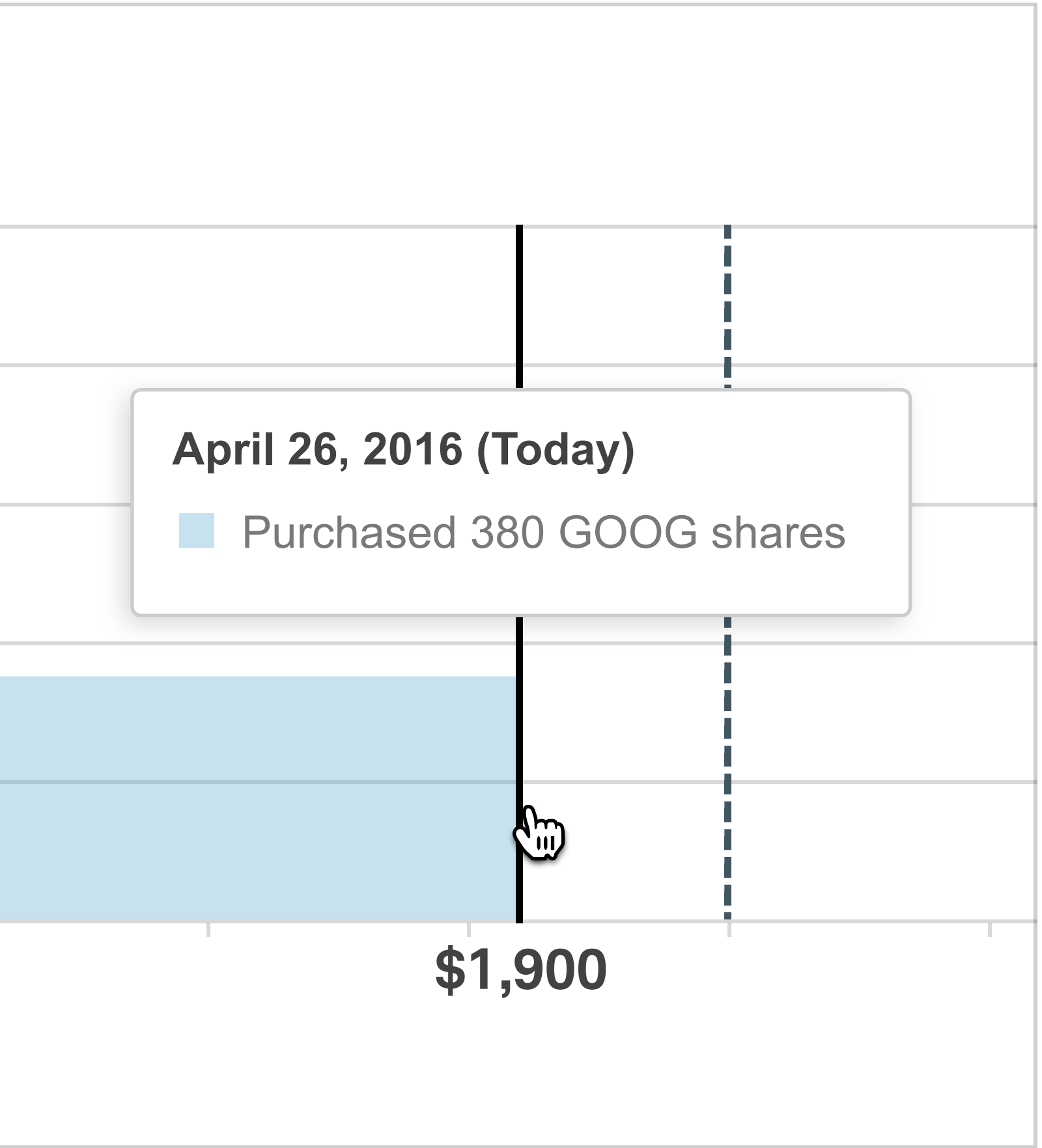
Award Overview: Line Chart (ESPP)



Hover State

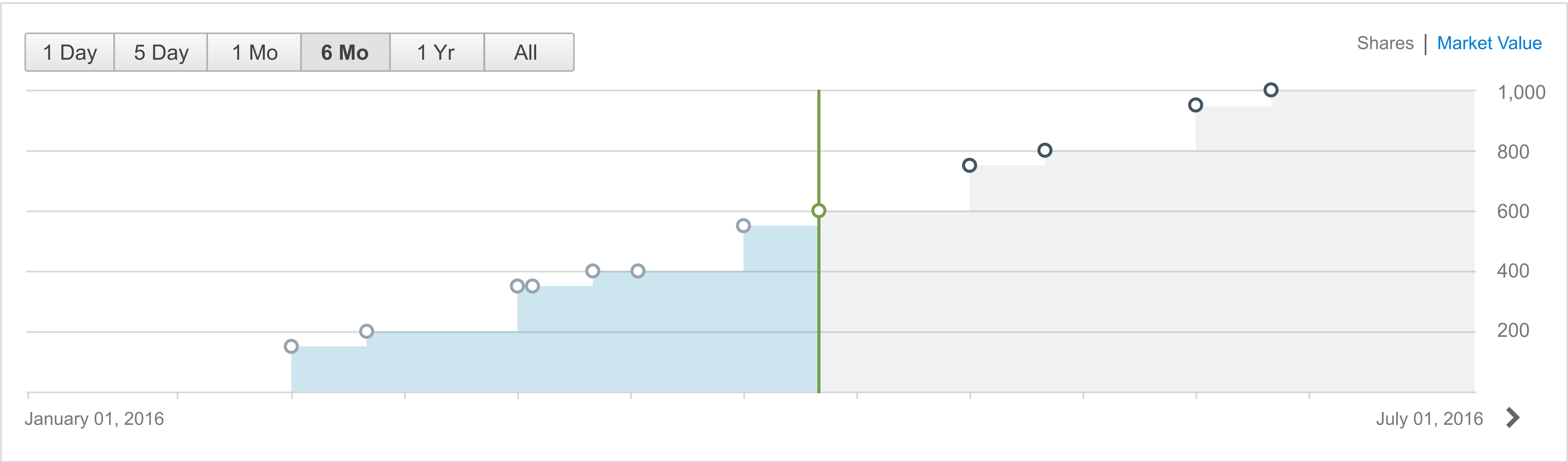


Hover Today

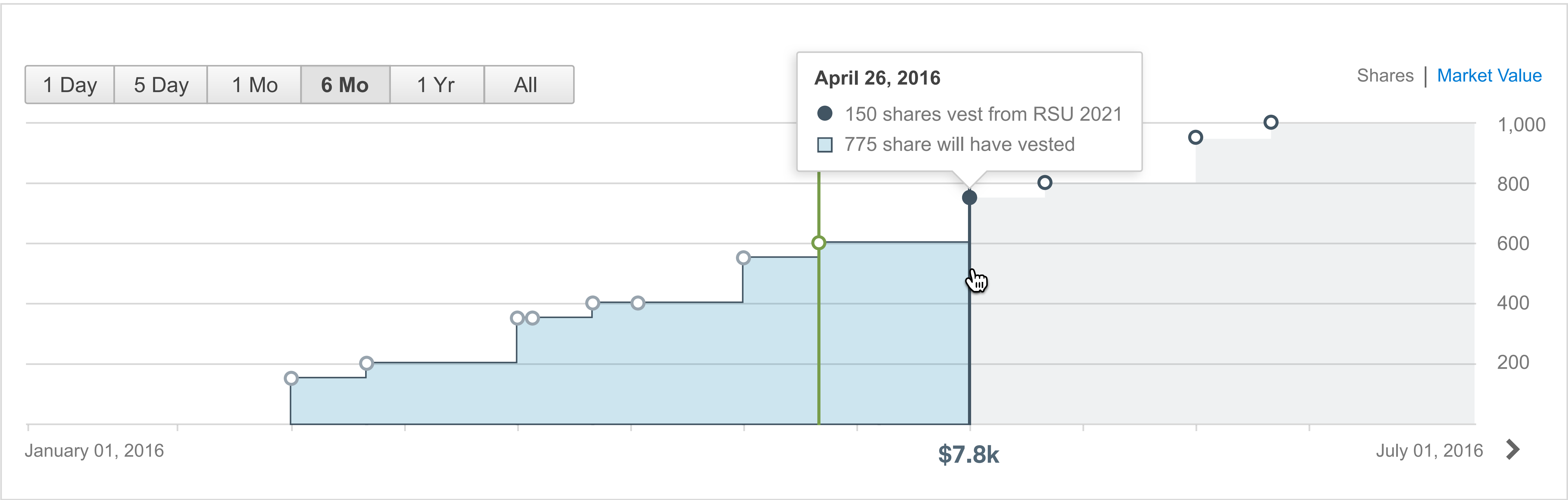


Data Visualization: Line Chart (Vesting Date)

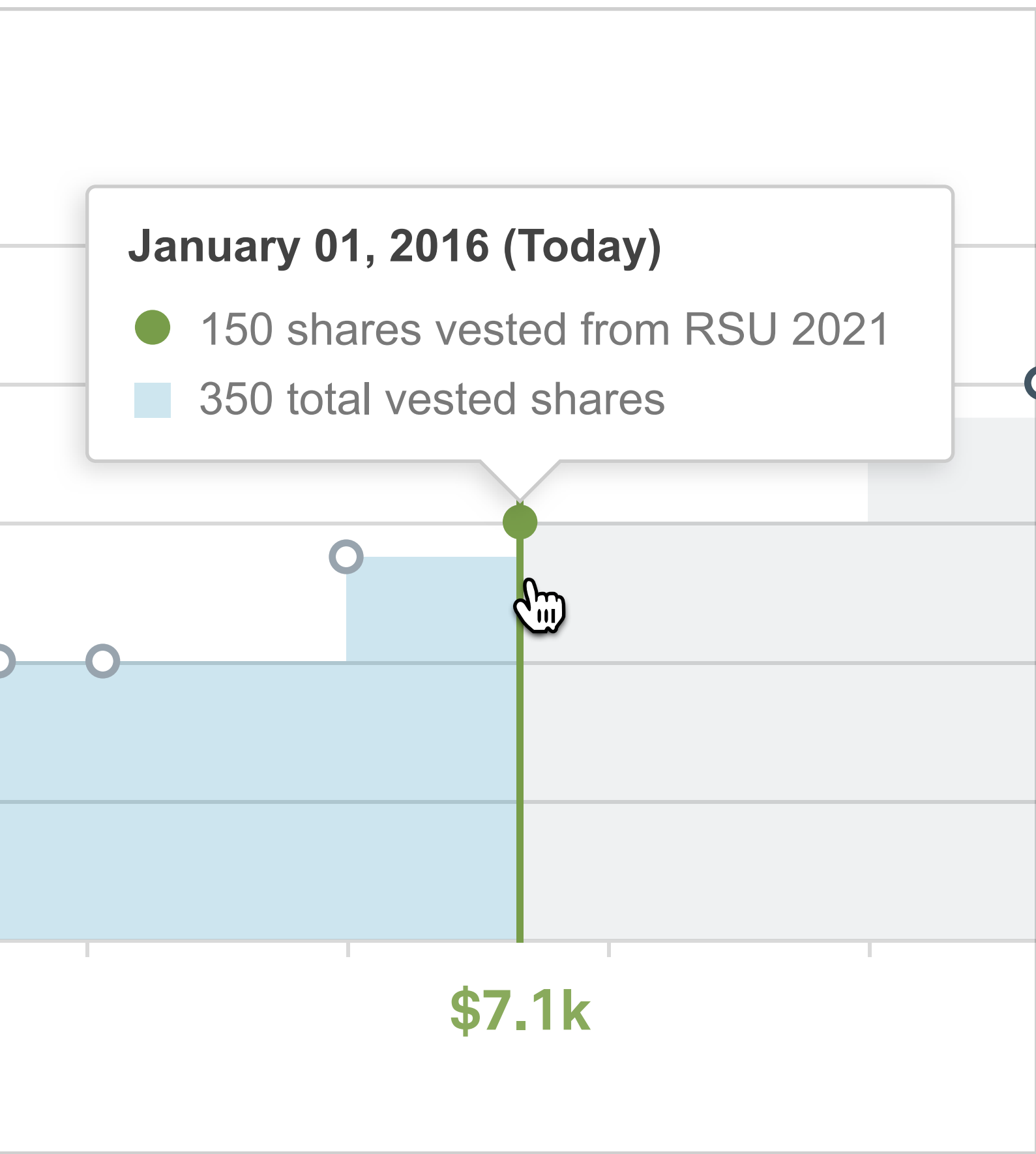
Purchase Date follows save visual / interaction patterns



Hover State



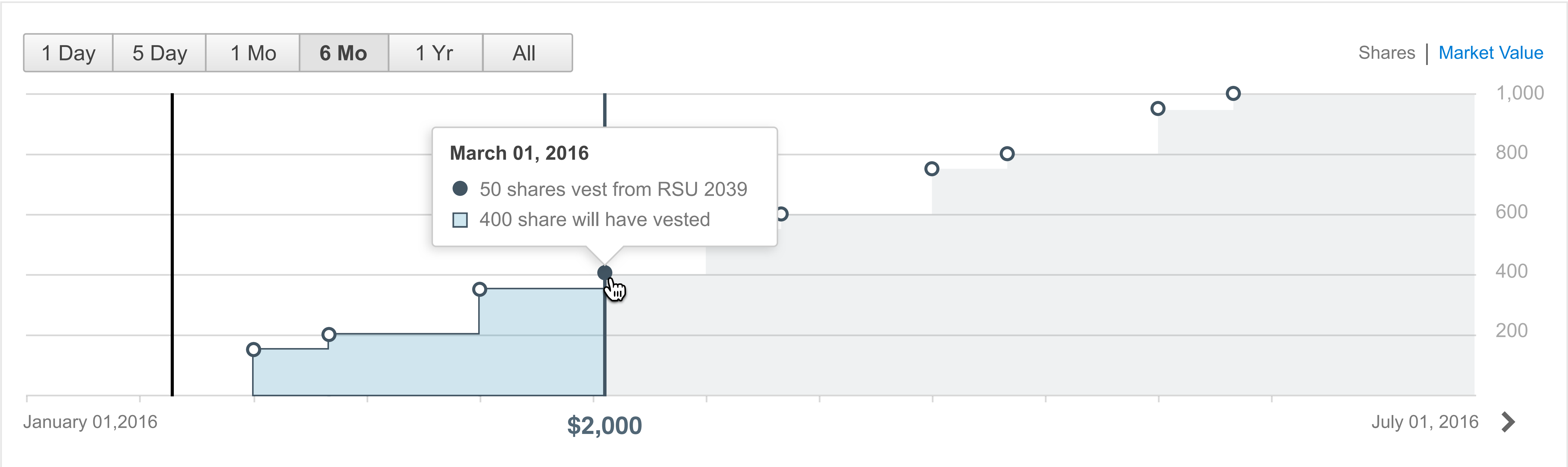
Hover Today



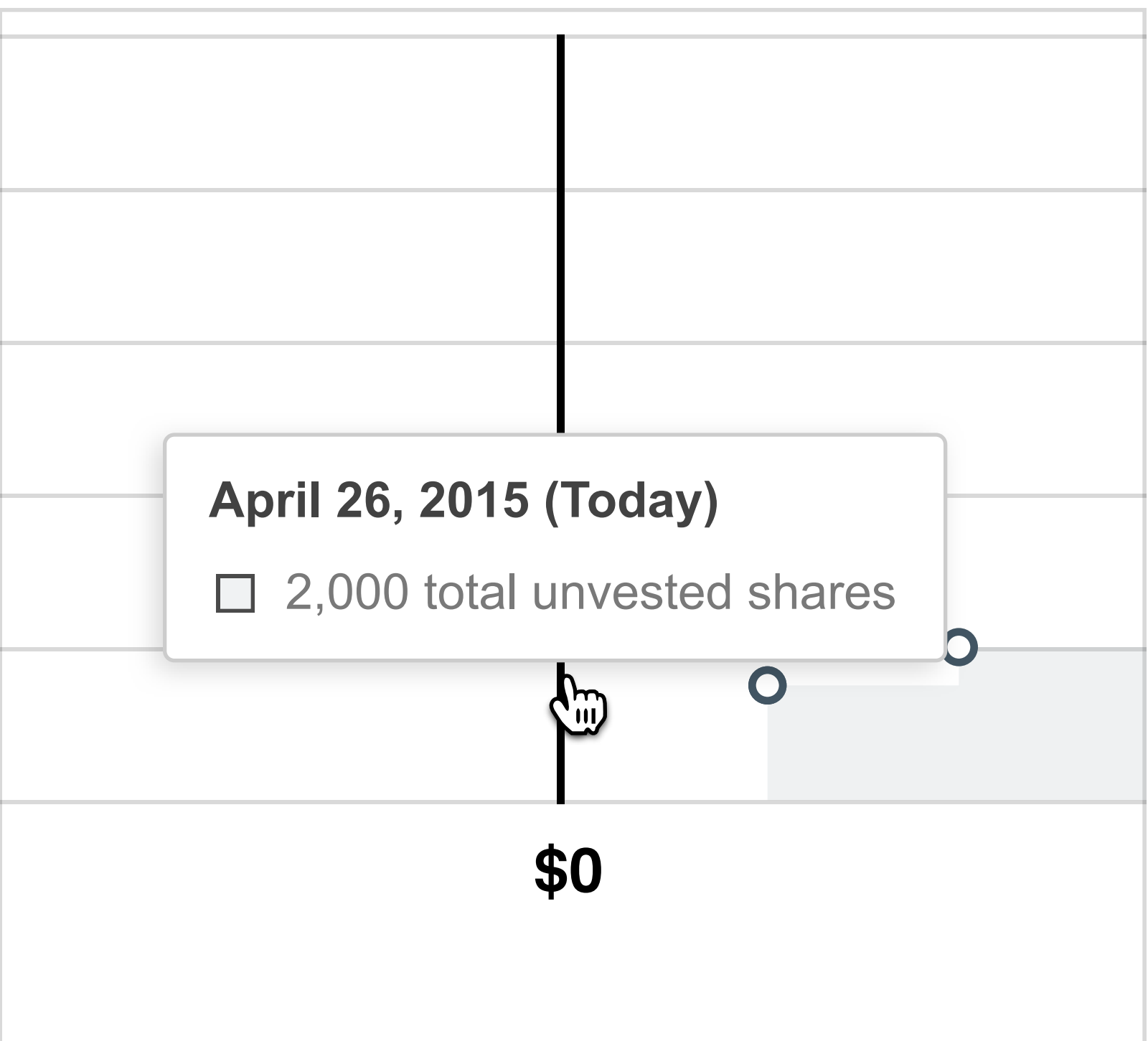
Data Vizualization: Line Chart (Vesting/empty)



Hover (Future activity)



Hover Today



EAC Dashboard

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Log Out

Equity Awards Center

Page last updated: 03:43 PM ET, 10/30/2015RefreshPrintOrder StatusTrade

All Awards: ☒ GOOG, Alphabet Inc. ☒ GOOGL, Alphabet Inc. ☒ BOX, Box Inc.

Equity Summary

\$2,250

Total

Restricted Stock

\$400

Available

Performance Stock

\$100

Available

Stock Options

\$250

Available

SharesMarket Value

\$2,250

Total

\$3.5k

Exercisable

\$250

Share Positions

\$1,500

Total Unvested

Employers

GOOG

Alphabet Inc

\$776.60

+\$14.09 (1.85%)

GOOGL

Alphabet Inc

\$793.96

+\$11.72 (1.50%)

BOX

Box Inc

\$12.80

+\$0.32 (2.56%)

Knowledge Center

Look up a quick definition in the [Glossary](#).

Your [employee stock purchase plan](#) may be one of the best benefits offered by your company. However, to appreciate the advantages of enrollin ... Read more [ESPPs: Basics](#).

If you are reading this article, your company has probably granted you [stock options](#). Congratulations. Stock options give you a potential sh ... Read more [NQSOs: Basics](#).

Employee stock purchase plans (ESPPs) are a super deal. However, the related taxation and financial planning can be deceptively complex. Thi ... Read more [ESPPs Advanced](#).

Events & Activities

All Award Events

Today

July 01, 2015

December 31, 2015

Most Recent

01 OCT

ESPP Purchase Date

Upcoming

20 OCT

Tax Elections Needed for RSU 2191

RSU 2021 Vest Date of 200 Shares

15 DEC

RSA 355 Vest Date of 150 Shares

+ 11 more events

Recent Past

26 AUG

Exercised 25 shares

DESIGNMAP / Charles Schwab EAC Visual Style Guide

January 21, 2016

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AccountsTradeResearchProductsGuidanceServiceMessagesContact UsHelp

Log Out

Equity Awards Center

Page last updated: 03:43 PM ET, 10/30/2015RefreshPrintOrder StatusTrade

All Awards:GOOG, Alphabet Inc.GOOG, Alphabet Inc.BOX, Box Inc.

Equity Summary

\$2,250Total

Restricted Stock

\$400Available

Performance Stock

\$100Available

Stock Options

\$250Available

SharesMarket Value

\$3.5k

Exercisable

\$250

Share Positions

\$1,500

Total Unvested

\$2,250Total

Employers

GOOGAlphabet Inc\$776.60+\$14.09(1.85%)

GOOGLAlphabet Inc\$793.96+\$11.72(1.50%)

BOXBox Inc\$12.80+\$0.32(2.56%)

Knowledge Center

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Your employee stock purchase plan may be one of the best benefits offered by your company. However, to appreciate the advantages of enrollin ... Read more ESPPs: Basics.

If you are reading this article, your company has probably granted you stock options. Congratulations. Stock options give you a potential sh ... Read more NQSOs: Basics.

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Events & Activities

All Award Events

Today

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RSU 2021 Vest Date of 200 Shares

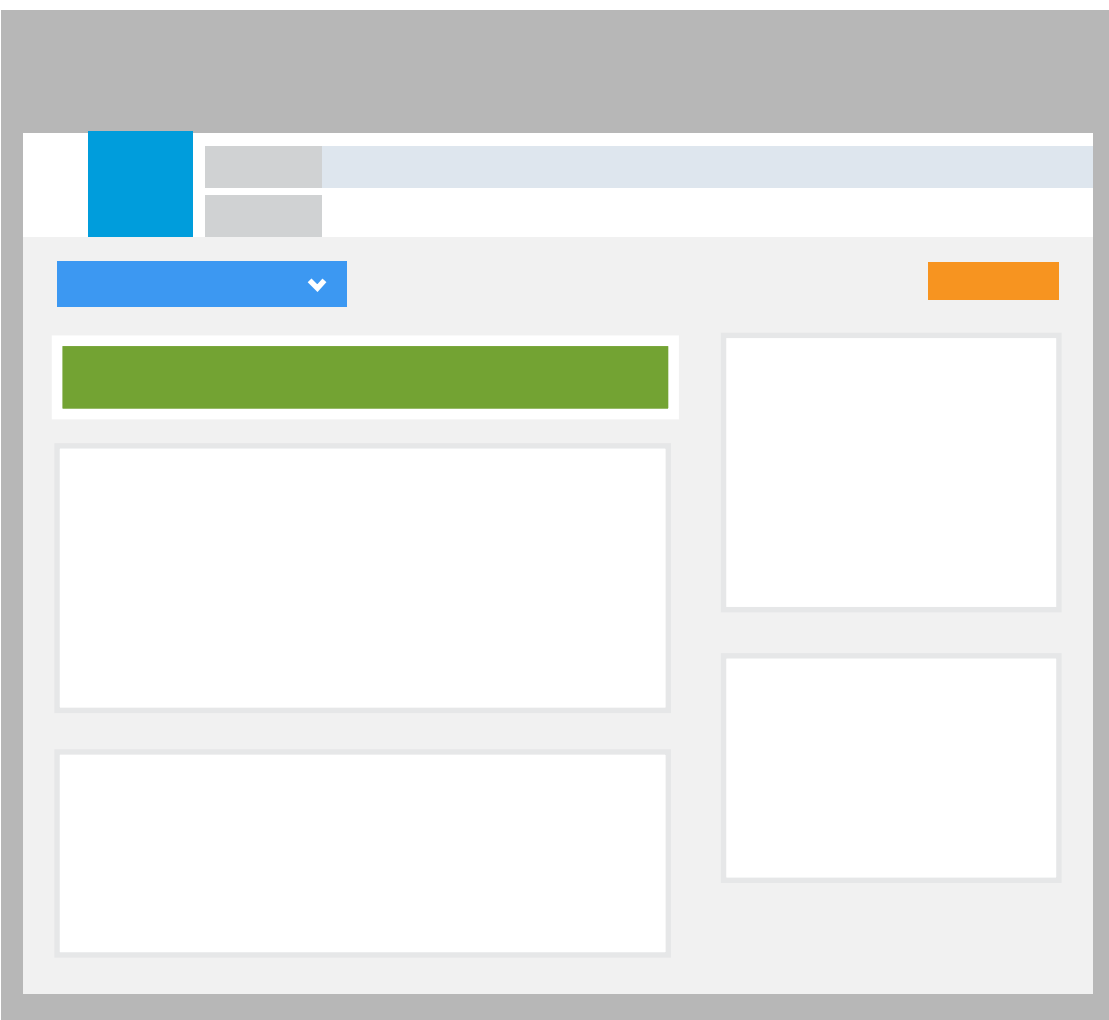
15 DEC RSA 355 Vest Date of 150 Shares

+ 11 more events

Recent Past

26 AUGExercised 25 shares

Notification Center



New Award Notifications - Min State

Only appears when new awards pending acceptment/enrollment.

New Equity Awards

Demo Company has offered you a new great equity award! Take action, and accept your award before it's too late.

Stock Options

Accept **500 Non-Qualified Stock Options** at \$5.10/share

Accept

All Awards - Max State

Welcome message only on first time experience. Changes to new awards notifications after first logging out.

Broken out by award type.

Welcome to the Equity Award Center!

Here you manage all things related to your company's equity, and Demo Company has offered you great equity award types. Get started, enroll in and accept your awards.

Employee Stock Purchase Plan

Enroll in Demo Company's Employee Stock Purchase Plan and purchase Demo Company's stock at a **discount of 15%!**

Enroll

Stock Options

Accept **500 Non-Qualified Stock Options** at \$5.10/share

Accept

Accept **500 Incentive Stock Options** at \$5.10/share

Accept

Restricted Stock

Accept **1000 Restricted Stock Awards** (a current value of \$12.8k) that will vest 25% every 6 months.

Accept

Equity Summary: Super Tabs

Default State

Equity Summary

\$2,250

Total

Share Positions

\$500

Available

Stock Options

\$250

Exercisable

Content Area

Hover State

Equity Summary

\$2,250

Total

Share Positions

\$500

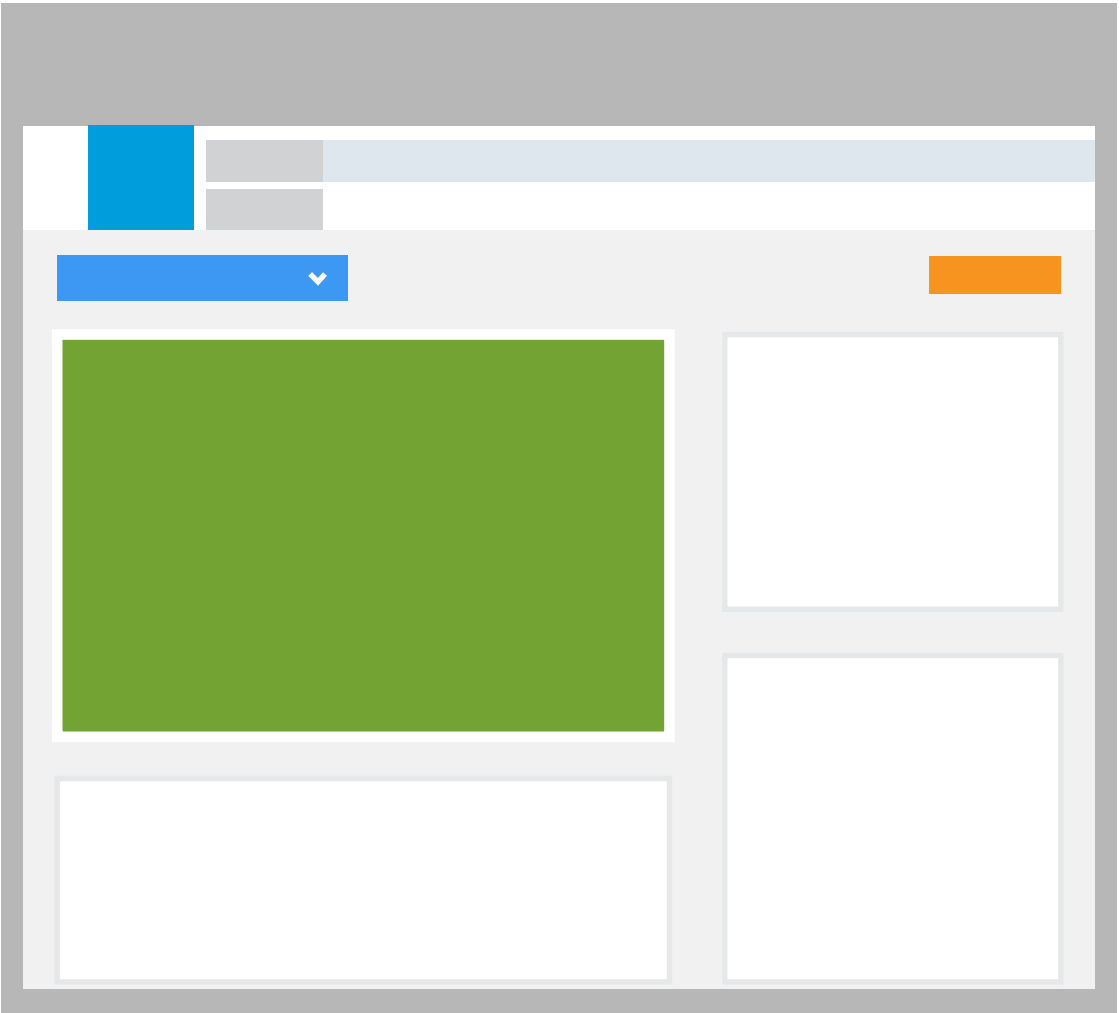
Available

Stock Options

\$250

Exercisable

Content Area



Super Tabs

Max State: 6 tabs

Min 2 award types for tabs

Equity Summary

\$21.2k

Total

ESPP

\$250

Available

Restricted Stock

\$500

Available

Stock Options

\$3.5k

Exercisable

Performance Stock

\$10.5k

Available

SARs

\$500

Available

Shares | [Market Value](#)

Content Area

1 award type

Moduel, no tabs, no doughnut chart view

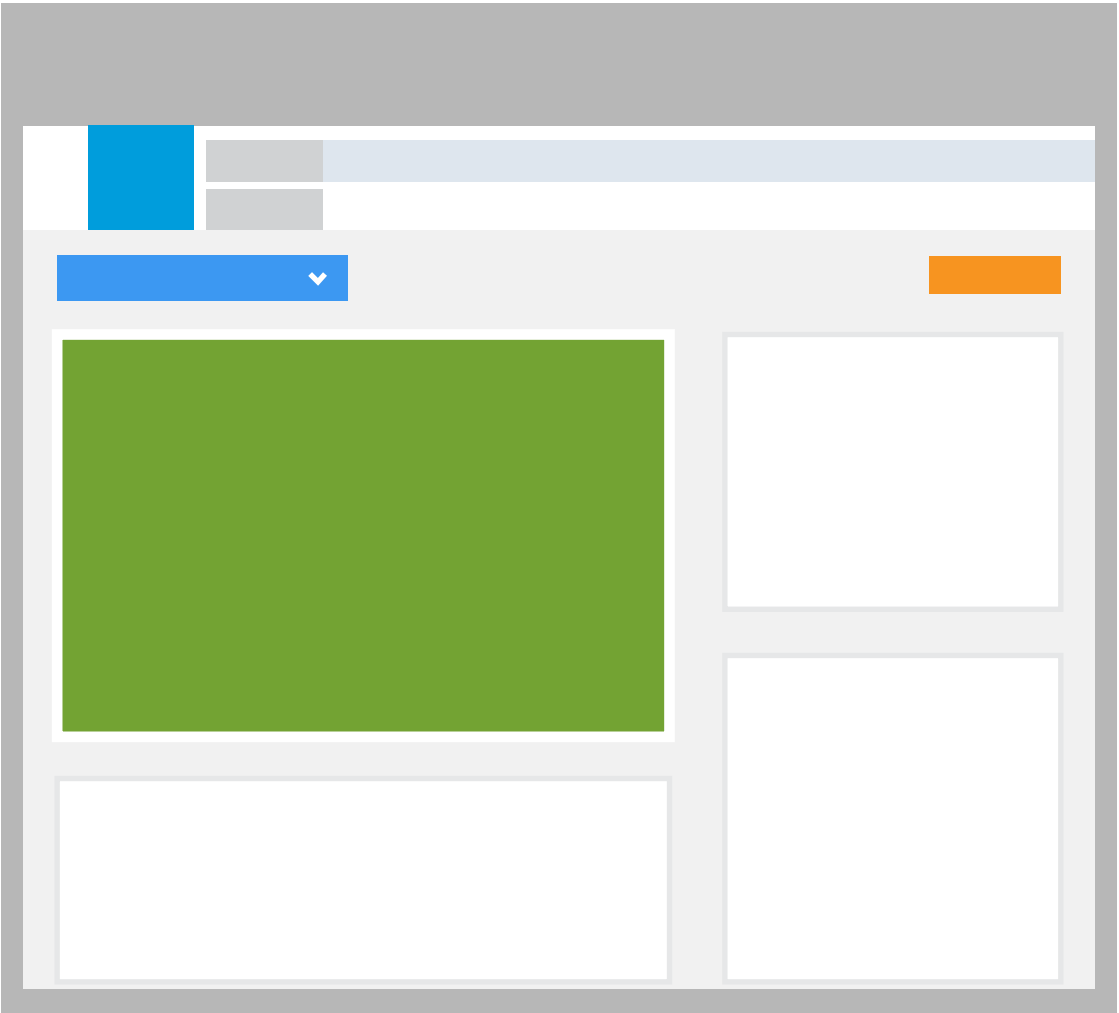
Equity Summary

Total

\$500

Shares | [Market Value](#)

Content Area



Visual Design

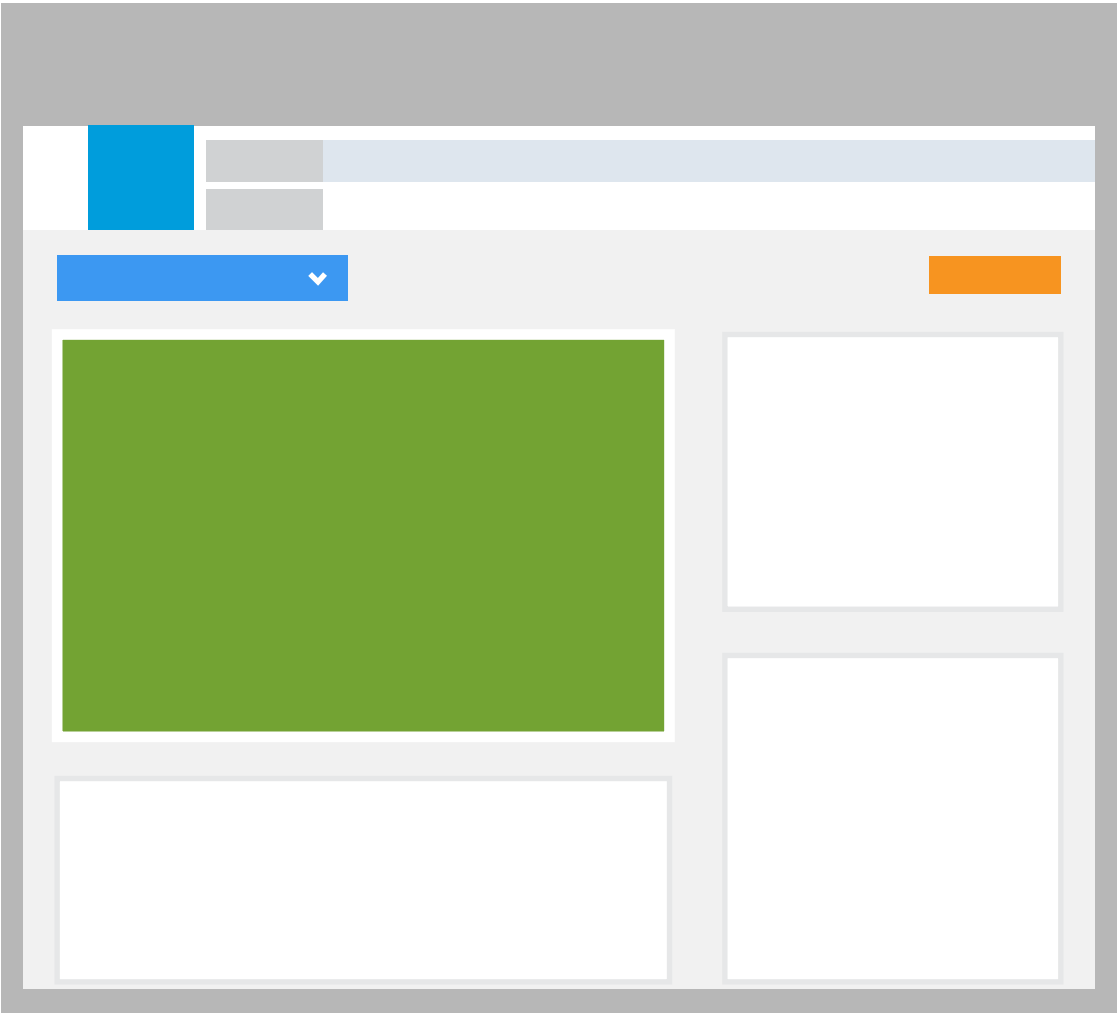
Tab Content Views

Toggle Switch – Data View

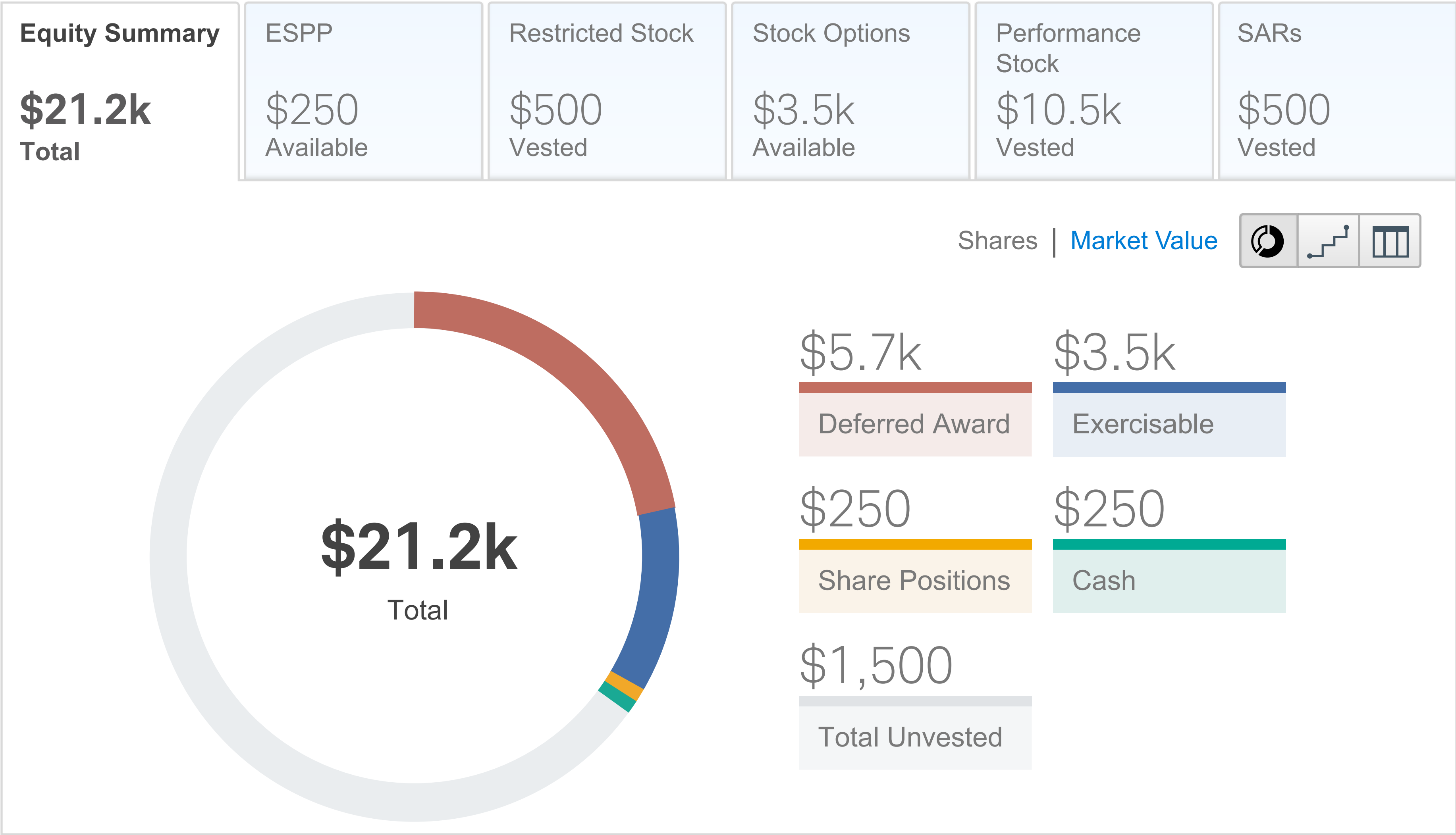
Shares | [Market Value](#)   

Shares | [Market Value](#)   

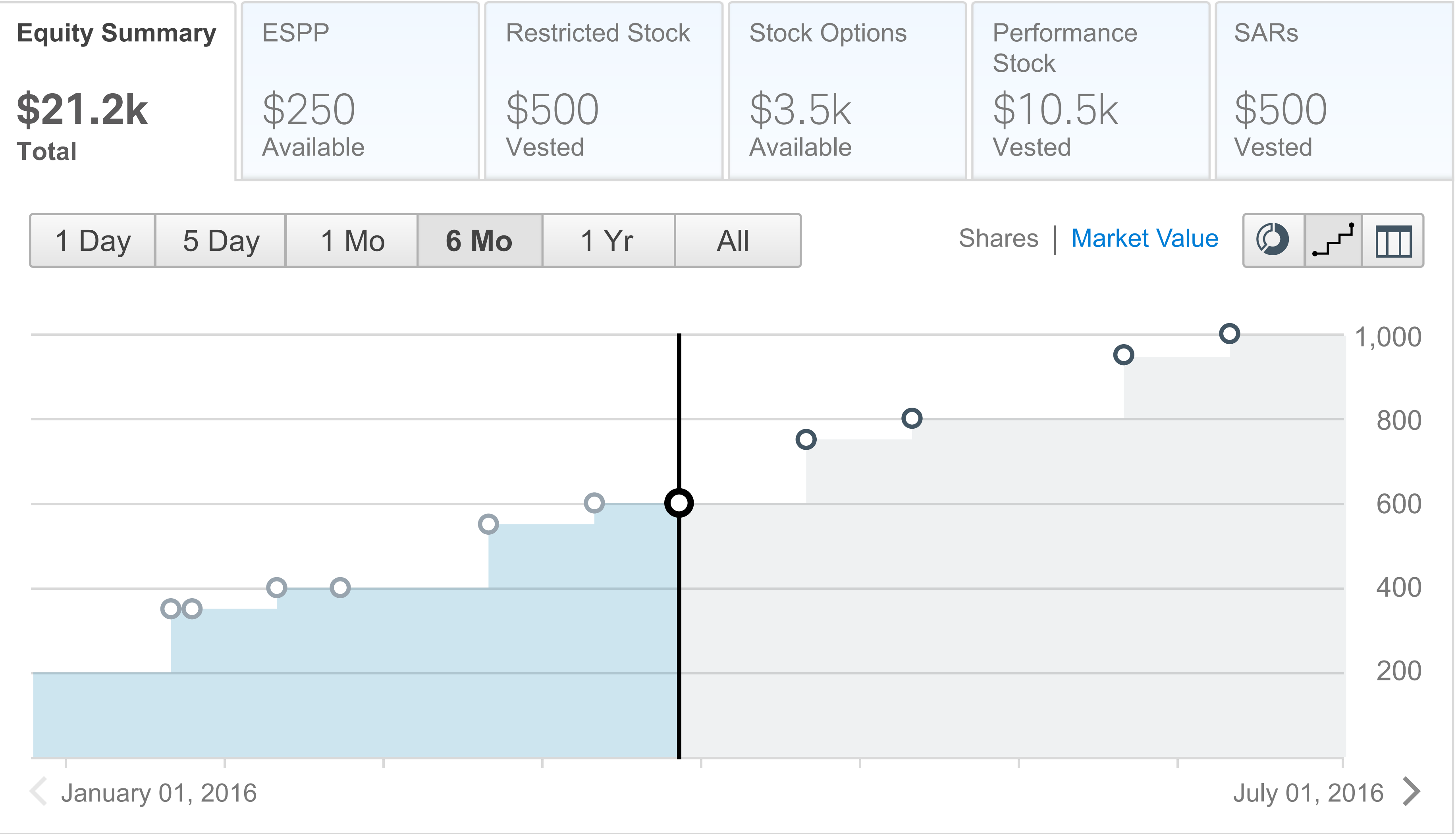
  





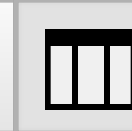
Doughnut Chart View



Line Chart View



Data Table View

Equity Summary						
<div><div>\$21.2k</div><div>Total</div></div>						
  						
Vesting Date	Award ID	Vesting Quantity	Shares or Options	Award Date	Remaining Unvested	Market Value
01/01/2016	NQSO2040	75	Options	09/29/2015	2,700	\$1000
	ISO1809	60	Options	06/15/2011	0	\$2500
	Totals	135	-	-	1,000	\$2200
10/28/2015	RSU500	1,000	Shares	12/22/2014	1,000	\$1000
10/05/2015	RSU501	185	Shares	01/01/2015	NA	\$3000

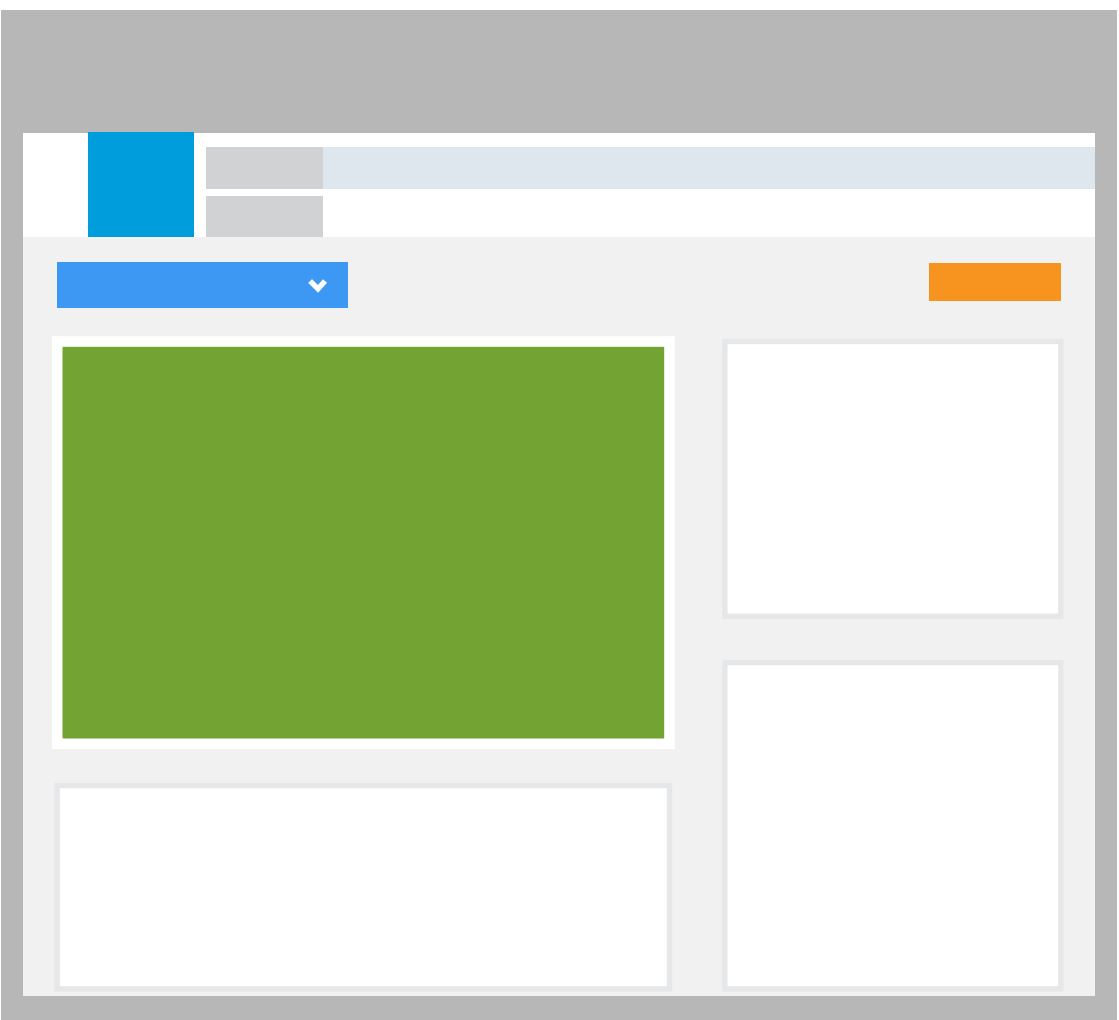
Use browser default scroll bar

Award Tabs: event widget

Event widget

If Vesting Date is current, event widget appears on award tab

Purchase Date follows same pattern



01
JUN

Vesting Date

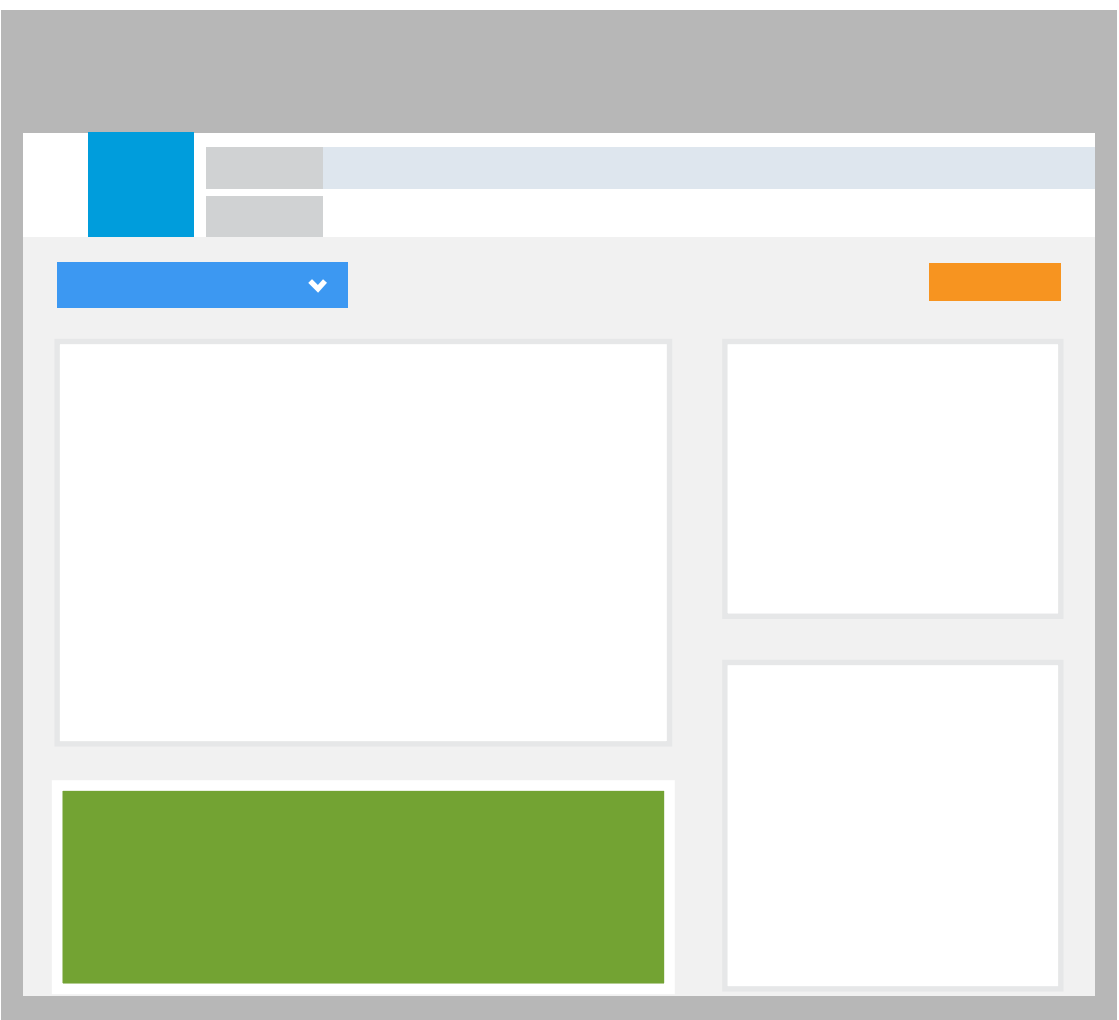
RSU 2039

250 shares have vested to your Brokerage Account.
In settlement period until available on June 04, 2015.

Order history

Events & Activities Module

Default – No Events Today



Events & Activities

All Award Events

<

Timeline from July 01, 2015 to December 31, 2015 with a 'Today' marker.

>

Upcoming

20

OC

Tax Elections Needed for RSU 2191

RSU 2021 Vest Date of 200 Shares

15

DE

RSA 355 Vest Date of 150 Shares

+ 11 more events

Past

26

AU

Exercised 25 shares

18

JUL

250 shares of RSU 2039 vested

Events & Activities

All Award Events

<

Timeline from July 01, 2015 to December 31, 2015 with a 'Today' marker.

>

Today

01

OC

ESPP Purchase Date

Upcoming

20

OC

Tax Elections Needed for RSU 2191

RSU 2021 Vest Date of 200 Shares

15

DE

RSA 355 Vest Date of 150 Shares

+ 11 more events

Past

26

AU

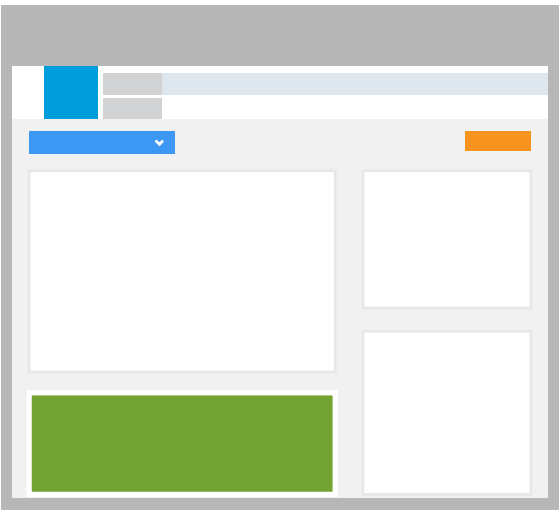
Exercised 25 shares

18

JUL

250 shares of RSU 2039 vested

Events & Activities Module



Expanded date - data table

Events & Activities

All Award Events

View all events

Today

July 01, 2015

December 01, 2015

Today

01 OCT

ESPP Purchase Date

RSU 2021 Vest Date of 200 Shares

Award	Symbol	Quantity	Activity	Remaining Unvested	Market Value
ESPP	GOOG	1,000	Shares purchased	NA	\$1,000
Restricted Stock	GOOGL	2,000	Shares vested	2,000	\$1,000
Total		3,000			\$2,000

Expanded date - CTA

Events & Activities

All Award Events

View all events

TODAY

Jul 2015

Dec 2015

Upcoming

01 OCT

14 OCT

Trading Period: Restricted Stock

Alphabet Inc GOOG will be available in trading period
October 01, 2017 - October 14, 2017

Trade

Expanded date - informational

Events & Activities

All Award Events

View all events

TODAY

Jul 2015

Dec 2015

Upcoming

01 OCT

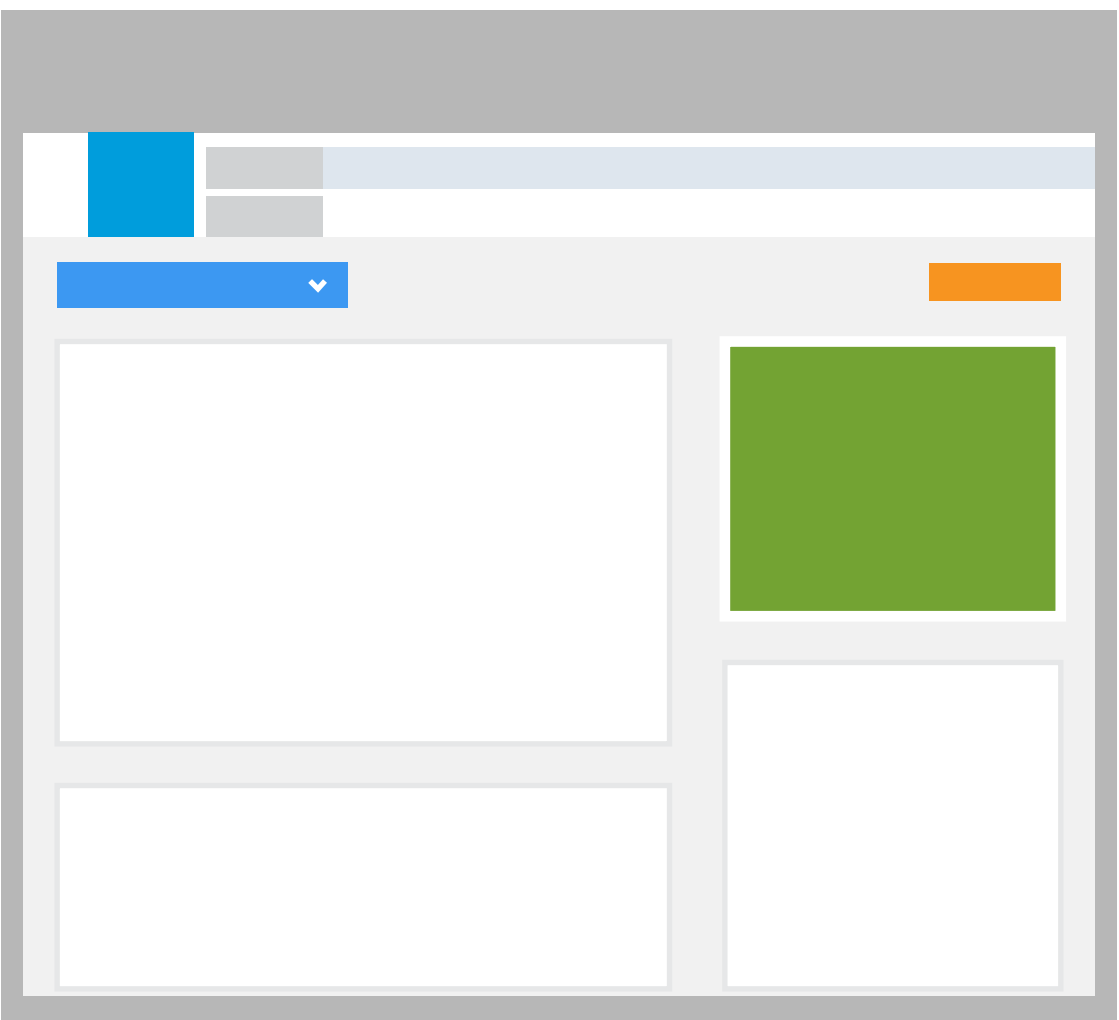
14 OCT

Blackout Period: Restricted Stock

Due to legal reason, your Alphabet Inc GOOG awards are currently in a blackout period, and are
unavailable to trade October 01, 2017 - October 14, 2017

Stock Ticker Module

Dashboard – Righthand rail



Multiple Stock Tickers



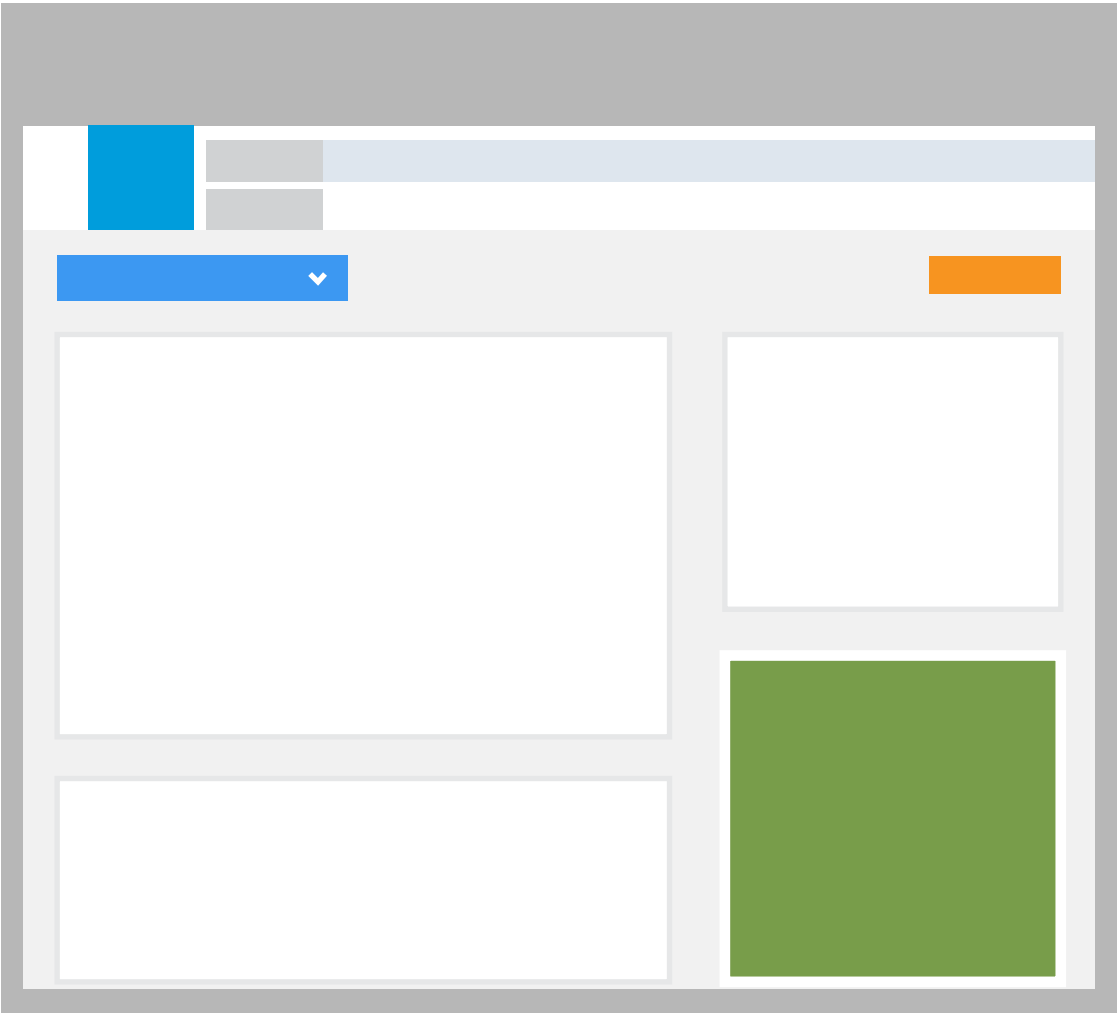
Closed State

Employers

GOOG	Alphabet Inc	\$776.60	+\$14.09 (1.85%)
GOOGL	Alphabet Inc	\$793.96	+\$11.72 (1.50%)
BOX	Box Inc	\$12.80	+\$0.32 (2.56%)

Knowledge Center Module

Dashboard – Righthand rail



Knowledge Center

—

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 *Opens external link in new tab*

EAC Award Details

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Log Out

Equity Awards Center

Page last updated: 03:43 PM ET, 10/30/2015RefreshPrintOrder StatusTrade

All Awards: ☒ GOOG, Alphabet Inc. ☒ GOOGL, Alphabet Inc. ☒ BOX, Box Inc.

Employee Stock Purchase Plan

\$1,500

\$500

10 SEPNext Purchase Date

Purchase Price - 600 shares
Share bought at 15% discount on purchase date

Net Proceeds
Current market value

Employee Stock Purchase Plan
Approximately 200 shares will be purchased.

Calculate Future Value

1 Day5 Day1 Mo6 Mo1 Yr

SharesMarket Value

August 01, 2016

● Approx. 50 ESPP shares purchase

January 01, 2016

\$3,000

January 01, 2017

Employers

▶ Alphabet Inc. GOOG

\$776.60

+14.09 (1.85%)

▶ Alphabet Inc. GOOGL

\$793.96

+11.72 (1.50%)

▶ Box Inc. BOX

\$12.80

+0.32 (2.56%)

Alphabet Inc. ESPP Purchase History

Calculate Future Value

Total Value

\$7,694k

Purchase Date	Symbol	Price per Share	FMV per Share	Difference Today	Date Holding Period Met	Shares Purchsed	Comments
12/10/2015	GOOG	\$550.40	\$776.60	17.39%	06/10/2016	68	View
09/10/2015	GOOG	\$540.40	\$766.60	19.42%	03/10/2016	84	N/A
06/10/2015	GOOG	\$530.40	\$756.60	20.19%	12/10/2015	100	N/A
03/10/2015	GOOG	\$520.40	\$746.60	22.57%	09/10/2015	120	N/A
12/10/2014	GOOG	\$510.40	\$736.60	28.90%	06/10/2014	163	N/A
09/10/2014	GOOG	\$500.40	\$726.60	38.38%	03/10/2014	192	View
Total				+15.72%		727	

DESIGNMAP

Charles Schwab EAC Visual Style Guide

January 21, 2016

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Log Out

Equity Awards Center

Page last updated: 03:43 PM ET, 10/30/2015RefreshPrintOrder StatusTrade

All Awards:

☒ GOOG, Alphabet Inc.

☒ GOOGL, Alphabet Inc.

☒ BOX, Box Inc.

Employee Stock Purchase Plan

\$1,500

\$500

10 SEP

Next Purchase Date

Purchase Price - 600 shares

Share bought at 15% discount on purchase date

Net Proceeds

Current market value

Calculate Future Value

1 Day5 Day1 Mo6 Mo1 Yr

SharesMarket Value

1,000

800

600

400

200

August 01, 2016

● Approx. 50 ESPP shares purchase

January 01, 2016

\$3,000

January 01, 2017

Employers

▶ Alphabet Inc. GOOG

\$776.60

+14.09 (1.85%)

▶ Alphabet Inc. GOOGL

\$793.96

+11.72 (1.50%)

▶ Box Inc. BOX

\$12.80

+0.32 (2.56%)

Alphabet Inc. ESPP Purchase History

Calculate Future Value

Total Value

\$7,694k

Purchase Date

Symbol

Price per Share

FMV per Share

Difference Today

Date Holding Period Met

Shares Purchsed

Comments

12/10/2015

GOOG

\$550.40

\$776.60

17.39%

06/10/2016

68

View

09/10/2015

GOOG

\$540.40

\$766.60

19.42%

03/10/2016

84

N/A

06/10/2015

GOOG

\$530.40

\$756.60

20.19%

12/10/2015

100

N/A

03/10/2015

GOOG

\$520.40

\$746.60

22.57%

09/10/2015

120

N/A

12/10/2014

GOOG

\$510.40

\$736.60

28.90%

06/10/2014

163

N/A

09/10/2014

GOOG

\$500.40

\$726.60

38.38%

03/10/2014

192

View

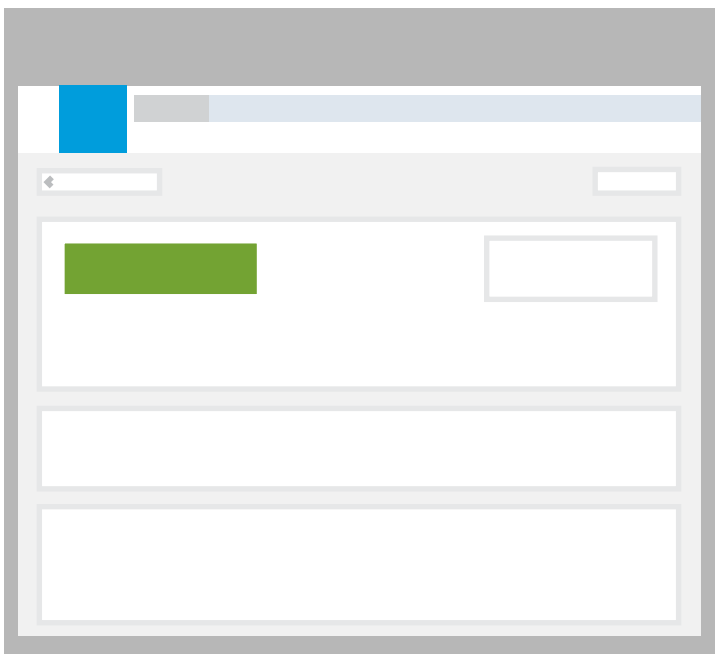
Total

+15.72%

727

DESIGNMAP / Charles Schwab EAC Visual Style Guide

January 21, 2016

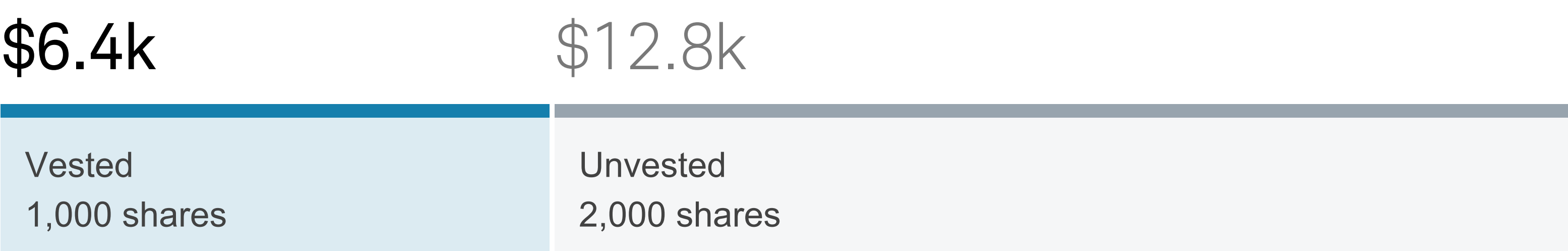


Award Hero Numbers

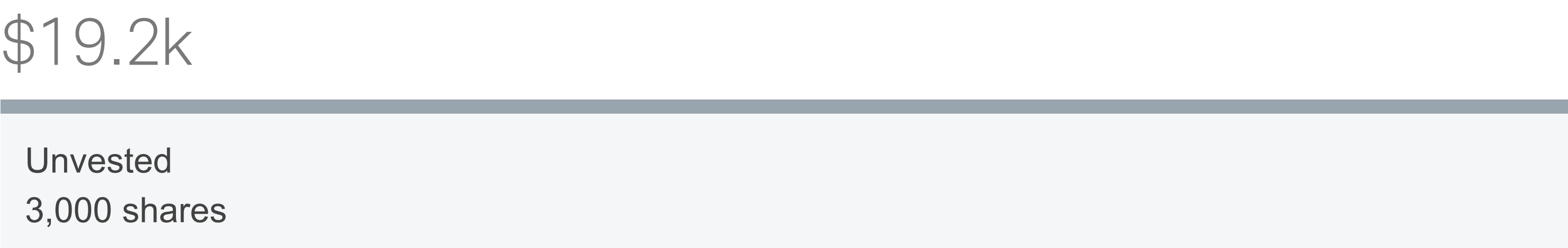
Vesting Awards

Restricted Stock, Stock Options, Performance Stock, SARs

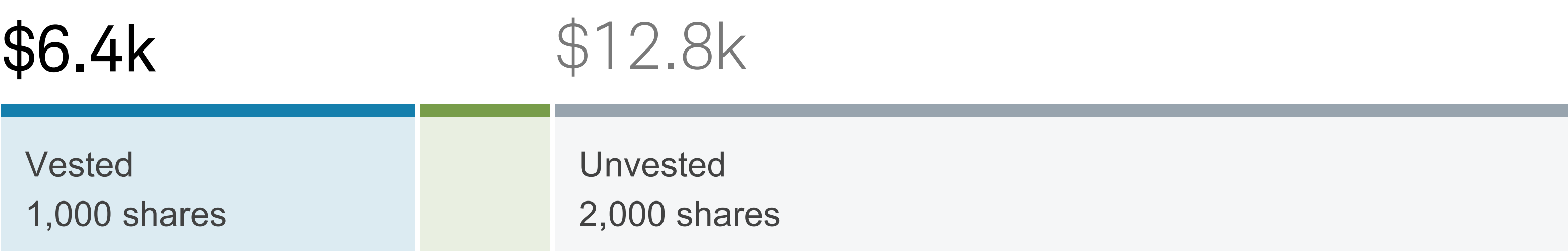
Default



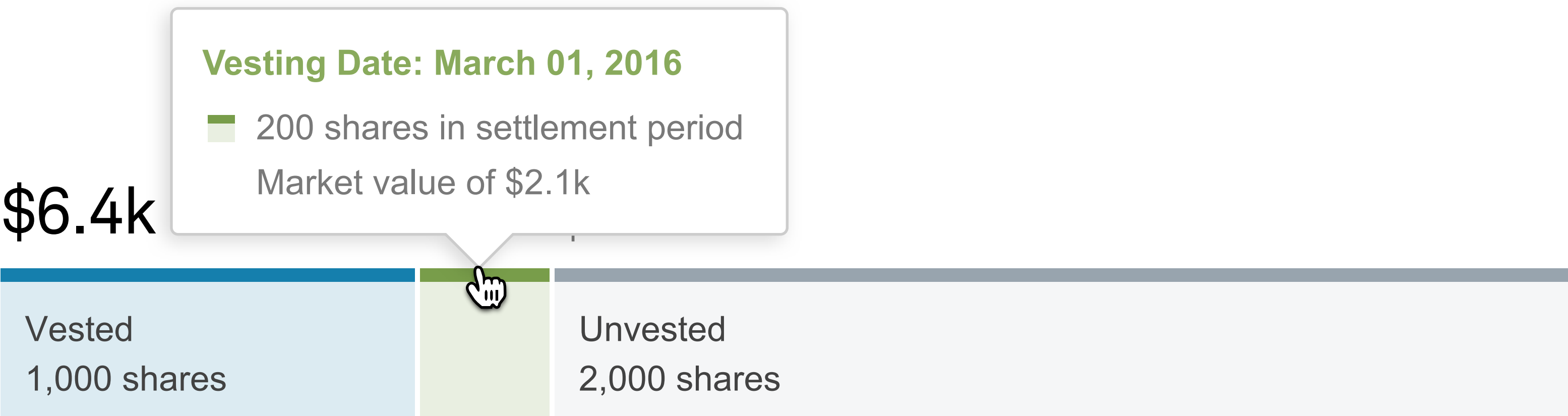
Empty State



Vest / Purchase date in settlement period



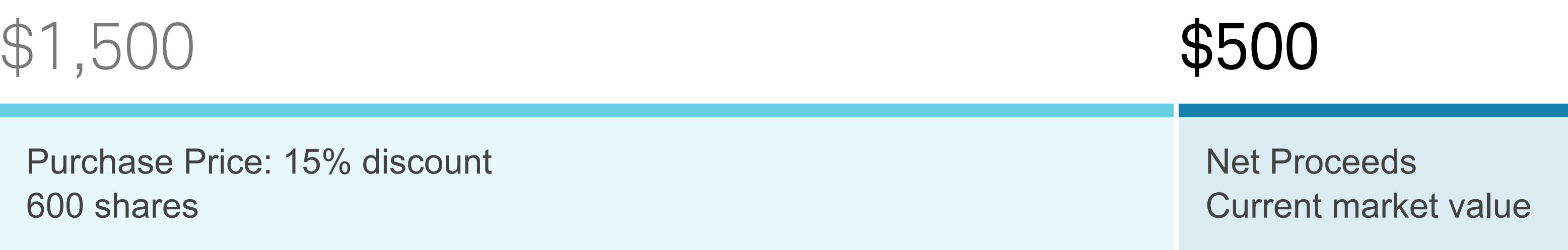
Hover State: Click to view Settlement Period



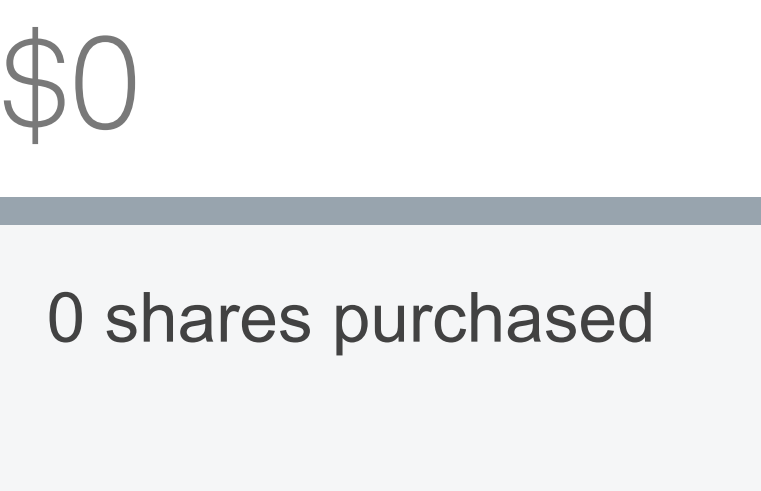
Purchased Awards

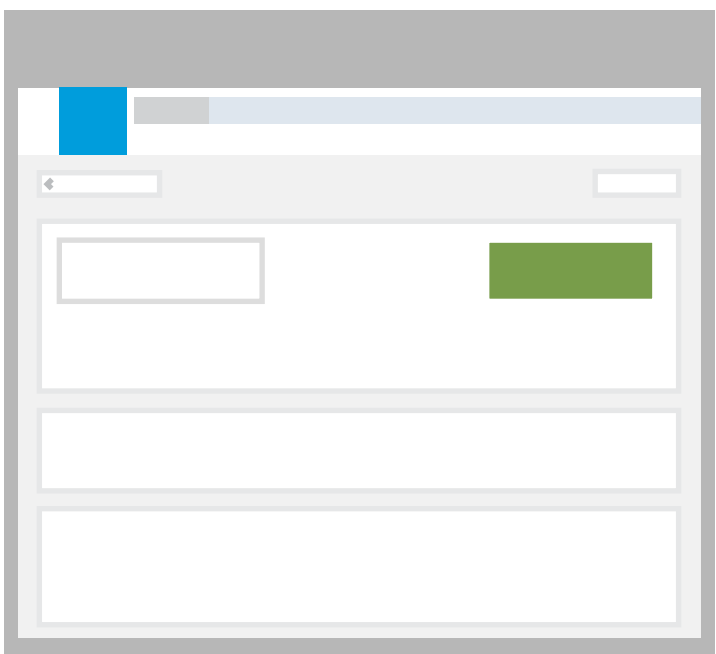
ESPP

Default



Empty State





Award Events Widget

Upcoming Event

01
JUN

Next Purchase Date

Alphabet Inc ESPP

Approx. 250 GOOG shares will be purchased.

01
JUN

Next Vest Date

RSU 2039

250 shares will vest to your Brokerage Account.

RSA 00127

500 shares will vest, valued at 10.90/share.

RSU 2039

250 shares will vest to your Brokerage Account.

More events

Vest / Purchase Date

01
JUN

Vesting Date

RSU 2039

250 shares have vested to your Brokerage Account. In settlement period until available on Jun 04, 2015.

Order Status

01
JUN

Vesting Date

RSU 2039

250 shares have vested to your Brokerage Account. In settlement period until available on Jun 04, 2015.

RSU 2039

250 shares have vested to your Brokerage Account. In settlement period until available on Jun 04, 2015.

RSU 2039

250 shares have vested to your Brokerage Account. In settlement period until available on Jun 04, 2015.

More events

Order status

Visual Design

Award Tables

Default (All Closed)

Alphabet Inc. Restricted Stock Awards (RSAs)										Calculate Future Value	
Total Value										Sell	
\$38k											
Award ID	Symbol	Available	Vested	Granted	Award Date	Remaining Unvested	Unvested Market Value	Granted Market Value	Tax Election	Grant Agreement Status	Messages
▶ RSA00124	GOOG	800	800	1,000	09/01/2015	200	\$2,000	\$10k	Make election	Accepted: Download	View
▶ RSA00127	GOOGL	2,000	2,000	2,500	08/15/2014	500	\$5,500	\$28k	Pay cash	Accepted: Download	N/A
Total		2,800	2,800	3,500			700	\$7,500	\$38k		

Expanded State

Restricted Stock Awards (RSAs)

Total Value
\$3,314.85

[Calculate Future Value](#)

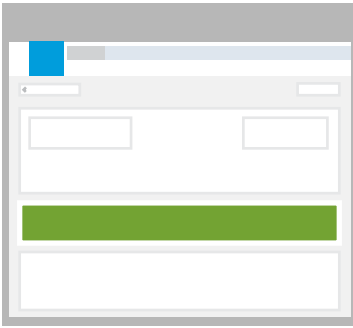
[Sell](#)

Award ID	Symbol	Available	Vested	Granted	Award Date	Remaining Unvested	Unvested Market Value	Granted Market Value	Tax Election	Grant Agreement Status	Messages
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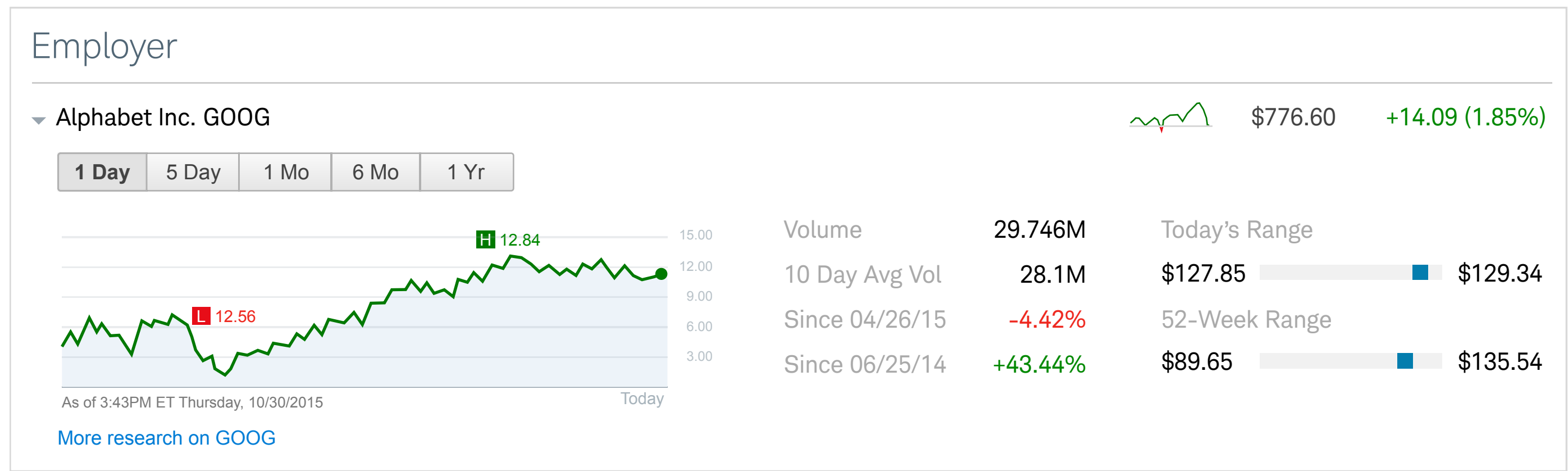
The waterfall chart illustrates the changes in the value of Restricted Stock Awards (RSAs) over time. The x-axis represents the timeline from January 01, 2016, to December 31, 2016. The y-axis represents the value in dollars, ranging from 0 to 1,000 (representing \$1,000,000). The chart shows a starting value of \$2,800, which increases to \$2,800 by January 01, 2016. A vertical line indicates the current date, showing a balance of \$7,500 in unvested RSAs and \$38k in granted RSAs. The total value of RSAs is \$3,314.85.

Date	Unvested	Granted	Total
January 01, 2016	200	2,600	\$2,800
Current Date	500	7,000	\$7,500
December 31, 2016	500	37,500	\$38k

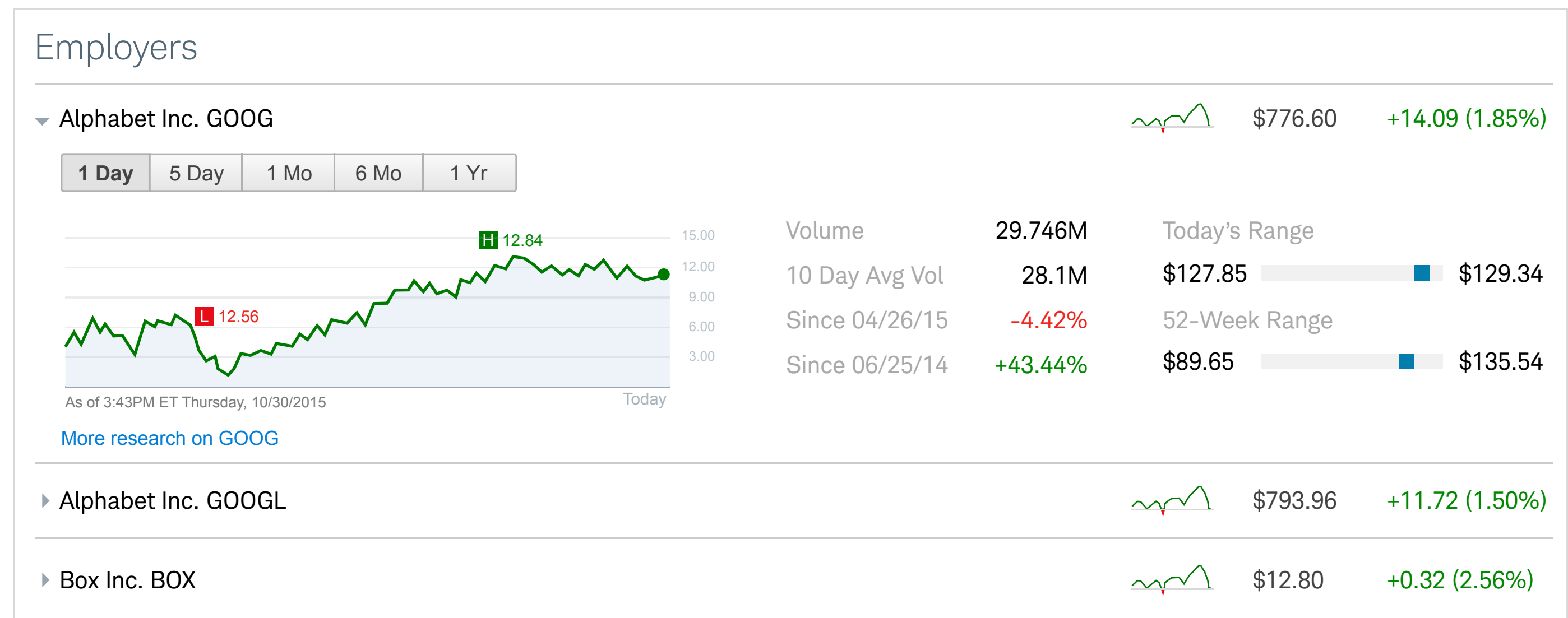
Stock Tickers



Details View - full 12 column



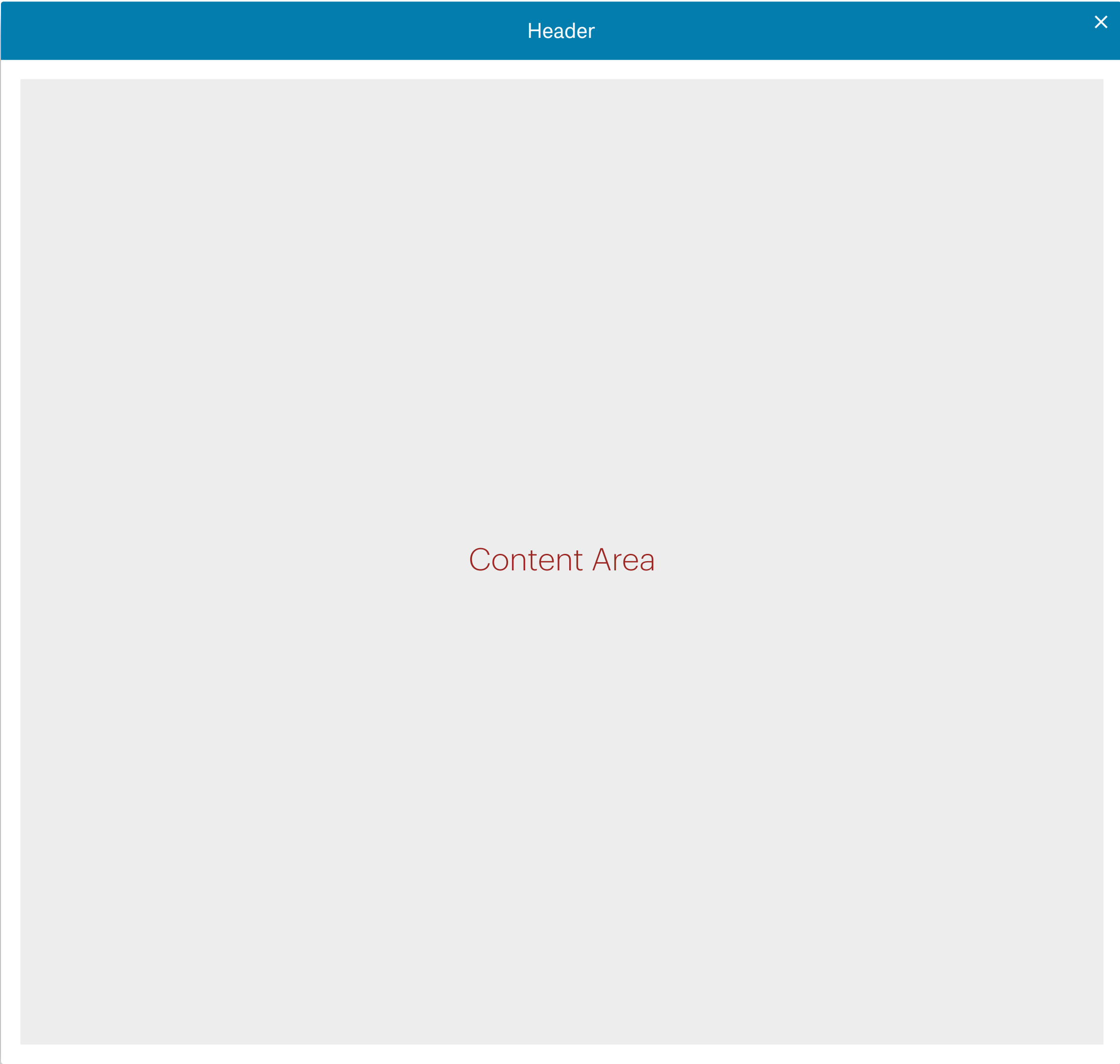
Multiple Stock Tickers



Closed States



Modal Overlays



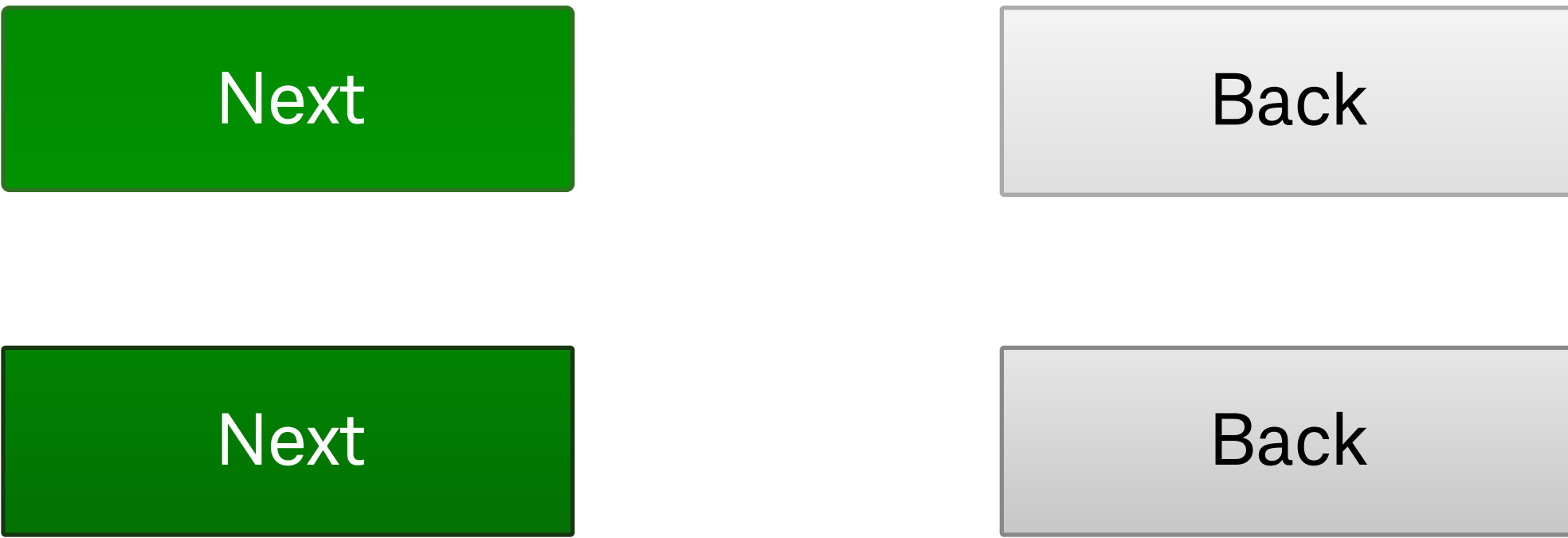
Follow most current standard

UI Elements

Visual Design

Schwab Standard Patterns

Buttons



Dropdown

Account Selector



Dropdown Selector



Tabs



Pagination



Carousel arrows



Deactivated - no data that way



Active

Typography

Headings

H2

Accounts Summary

Charles Modern Light / 24px
■ #425563

Hero Number

\$122.00

Charles Modern Light / 30px
■ #333333

H3

All Awards

Charles Modern Light / 20px

Secondary Number

4704.75

Charles Modern Light / 24px

Body

Regular Text

Total equity value

Arial Regular / 14px
■ #333333

Hyperlink Text

[Details](#)

Arial Regular / 14px
■ #0066cc

Supplimental Text

Today's Range

Arial Regular / 13px
■ #333333

Small Supplimental Text

As of 03:00PM ET Wednesday, 11/05/2015

Arial Regular / 10px
■ #333333

Visual Design

Stepometer



UI Sliding Selector

Default slider, ESPP enrollment contribution seletor, Share Positions Calcuator



Enter manual option, Options Calculator

