

Says

What have we heard them say? What can we imagine them saying?

Thinks What are their wants, needs, hopes, and dreams?

thinks that

samater than

the average

she is

thinks some

advisors have

questionable

motivation

financial

What other thoughts might influence their behavior?



i don't want to have someone else manage my finances completely

i don' want to be a burdern on others

i want my family to be well positioned financially

Persona's name

Short summary of the persona

listens to investing podcasts andreads subscription investing newsletters

text with her statebank financial advisor or talks to them on the phone

onducts her own maket research and wants to discuss he findingd with her advisor

feels worried about weathering a major downturn, financial crisis, or recession

feels joy watching the market as an everboday hobby and wants to keep itthat way

feels worried abot weathering a major downturn, financial cris or recession

Feels

thinks she can

even though she

recently retired

and on a fixed

income

still take risk

Does

What behavior have we observed? What can we imagine them doing?



What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



