Says

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

Thinks some financial advisors have questionable motivations

Thinks the right advisor could be a good sounding board and ally

Thnks that she is smarter then the adverage investor

Thinks she can still take risks even though she's recently retired and on a fixed income



Persona's name

Short summary of the persona

Conducts her own market research and want to discuss her finding with that advisor

Participation in financial things at local

Listens to investing podcasts and reads subscription investing newstars

Feels trustrated when her ideas or questions are dismissed or not adequately addressed

Members an active participation

I don't want to

have someone

else manage

my finances

Feels worried about the financial legacy she will leave to their children

Does

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

See an example

Feels

Thinks

I don't want

burden on

to be a

others

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

What other thoughts might influence their behavior?

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