**PERSONA TEMPLATE - Richard Clarkson (Manager)**

|  | **PERSONA PHOTO** |  | **GOALS AND MOTIVATIONS** |  | **CHALLENGES AND OBSTACLES** |
| --- | --- | --- | --- | --- | --- |
| Goals:   * Get a competent grasp on new technology Obtain a better work/life balance. * Purchase an investment property where his grandkids can visit after his retirement.   Motivations:   * Become fluent in Mandarin to better communicate with potential traders in Asia. * Familiarize himself with new stock and trading legislation both in the USA and the prominent trading countries. | Although Richard isn’t up to date with technology, he can operate most basic applications and is open to learning new technology to get a leg up on financial competitors and increase his efficiency regarding his daily operations.  He's interested in being among the first traders for relevant opening markets across the world, so Richard will have to be up in the early hours of the morning to work without disturbing the people around him. |
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| **QUOTATION** | |
| **“I'm not super up to date with the latest tech trends, however I highly value my time, and would like a device to enhance my day-to-day efficiency.”** | |
| **NAME** | |
| Richard Clarkson | |
| **AGE** | |  |  |
| 54 | | **FRUSTRATIONS** | **SOURCES OF INFORMATION** |
| **GENDER** | | Due to losing an eye, Richard struggles with lack of depth perception and constantly has to reread data to ensure he can interpret it correctly to minimize damage to the business due to human error.  He tries to adapt to this by having high contrast text to enable faster and more accurate reading. | **BOOKS** |
| Male | | **Rich Dad Poor Dad, The Intelligent Investor, The Disciplined Trader** |
| **LOCATION** | | **BLOGS** |
| New York City | | **Vinography** |
| **OCCUPATION** | | **CONFERENCES** |
| Banker | | **Risk and Compliance Conference** |
| **JOB TITLE** | | **EXPERTS** |
| Hedge Fund Manager | | **Warren Buffet, Jordan Belfort** |
| **HIGHEST LEVEL OF EDUCATION** | | **MAGAZINES** |
| Master’s of Accounting & Finance | | **Journal of Finance** |
| **ANNUAL INCOME $162,000 USD** | | **WEBSITES** [**www.xe.com**](http://www.xe.com) |