

Jon Davis

age: 25

residence: New York, Brooklyn

education: Masters in Finance at Baruch University

occupation: Financial Adviser

marital status: Single



The more we save the better!

Jon spends most of his time completing his work and making sure his clients get exactly what they want. Jon is now in his second year of working for his finance firm and realizes that there is much more that he needs to learn before he can become a top financial adviser.

Comfort With Technology

INTERNET



SOFTWARE



MOBILE APPS



SOCIAL NETWORK



Criteria For Success:

When a client portfolio achieves its goals on time while saving plenty of money.

Needs

- To have project self-managed
- Excellent User Experience
- Tangible Results

Values

- Detailed planning
- Decisions backed up by data
- Thorough communication

Wants

- To see User feedback before a major decision
- To save as much money as possible
- Faster software to complete calculations

Fears

- Losing Money
- Disappointing Users
- Lossing clientele

