

Says

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



Thinks

What are their wants, needs, hopes, and dreams?
What other thoughts might influence their behavior?

Trends

Needs

Financially

Well -
Positioned

Advisor

An active



Persona's name

Retirement

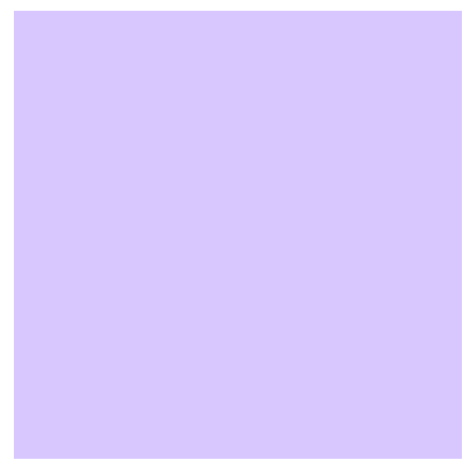
Growing

During

Reading up

Burden

Happening
again



Does

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



Feels

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

[See an example](#)