



Says

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

"I trust my advisor, but an active partnership."

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

"I want to continue growing my wealth even during retirement."



Thinks

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

Thinks some financial advisors have questionable motivations

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

Thinks that she is smarter than the average investor



Persona's name

Short summary of the persona

Participates in financial forums or local groups where she can engage in financial discussions and share her interest with like-minded individuals.

Maintains an active partnership with her advisor, proposing and discussing potential investment strategies

Texts with her statebank financial advisor or talks to them

Feels worried about the financial legacy she will leave to their children (and how best to leave it)?

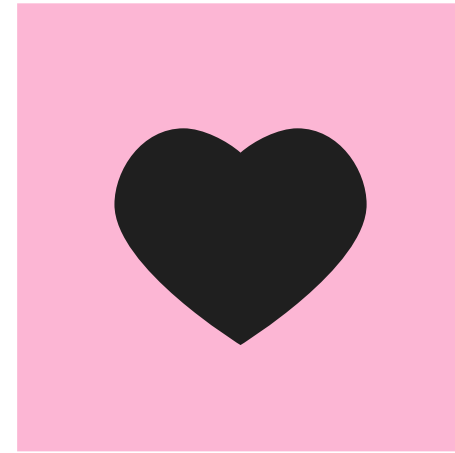
Feels daunted by the thought of losing control over her finances or having to fully rely on someone else's judgment

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



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?