Joan Perez

age: 21
residence: Charlotte, NC
education: High School
occupation: Student with part-time on campus job
marital status: Single | No children
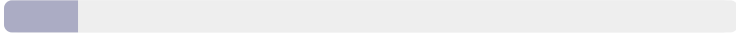
I'd really like some help keeping track of my money.

Joan strives to become a teacher, but currently is struggling with finances
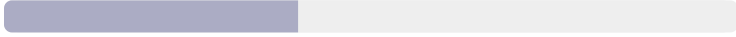
Comfort With Technology

INTERNET

SOFTWARE

MOBILE APPS

SOCIAL NETWORK

Criteria For Success:
Needs to keep track of spending and create a budget.

Needs
- Easy-to-use app
- Easily updateable budget to keep up with the inconsistency of college life

Wants
- To still have money to go out and have fun

Values
- Free time
- Efficiency

Fears
- Cutting into already sparse free time
- Drowning in debt

M●BILITY LABS

Ricky Metzger

age: Late 20's

residence: Washington, DC

education: Bachelor Degree of Finance

occupation: Virtual Assistant

marital status: Single | No children

I'd love to help you, what kind of help are you looking for?
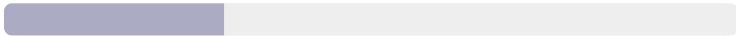
Likes to spend the work day either sending messages through a virtual chat or on calls with customers who need financial advice.

Comfort With Technology

INTERNET

SOFTWARE

MOBILE APPS

SOCIAL NETWORK

Criteria For Success:

Assisting users that need help in the Fundflo app

Needs
- Excellent User Experience
- To be involved with customers virtually

Wants
- Easy to use app
- To see User info before any major decision

Values
- Detailed communication
- Decisions backed up by research

Fears
- Disappointing Users
- Giving bad financial advice

MOBILITY LABS

Sean Perkins

age: 33
residence: Washington, DC
education: Bachelors Degree (BA)
occupation: Business Owner
marital status: Single | No children

I think this idea could work, I just need to put more energy into it.

Sean is juggling many projects and priorities. He appreciates help when he can get it. When tackling something new he prefers to do some research then consult an expert.

Comfort With Technology

INTERNET

SOFTWARE

MOBILE APPS

SOCIAL NETWORK

Criteria For Success:

Wants an app that can both help budget and be used for trading.

Needs

- Tangible results
- Easy to use app that is both functional and informational

Wants

- Start small
- See results before investing more money

Values

- Detailed planning
- Concrete expectations
- Decisions backed up by analytics or data

Fears

- Failure
- Wasting money
- Being too hasty

MOBILITY LABS