

Says

i trust my

an active

advisor, but it

needs to be

partnership

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?



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

Thinks often about the world of finance and investing

Thinks some financial advisors have questionable motivations

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



Persona's name

Short summary of the persona

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

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

Checks the financial markets and reading up on the latest financial news and trends

Feels frustrated when her ideas or questions are dismissed or not adequately addressed

Feels energized by optimizing her wealth and passing down an inheritance to her family

Feels excitement about investing causing her to take too many risks as she approaches old age

Does

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



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



