

## Says

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

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



**Thinks** 

I dont want to have some else manage my finance completly

I trust my advisor but it needs to be an active partnership

I want to cotinue growing my wealth even during retirement

about the world of finance and invesing

Thinks often

Thinks some financial advisor have questionalbe motivations

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



## Persona's name

Short summary of the persona

Conducts her own market research and want to discuss her findings with her advisor

Listen to investing podcasts and read subscription investing newsletters

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

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

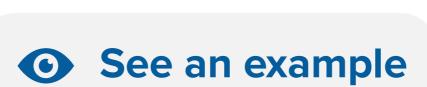
Feels worried about the financial legacy she will leave to their children and how best to leave it

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



## 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?

