



Says

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

i want to  
continue  
growing my  
wealth even  
during  
retirement

i dont want  
to be a  
burden on  
others

i worry about a  
2008 style crash  
happeningagain

i want my  
family to be  
well  
positioned  
financially



Thinks

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

think the right  
advisor could  
be a goood  
sounding board  
and ally

Think often  
about the  
world -of  
finance and  
investing

Think that she  
is smarter  
than the  
average  
investor

Think she can  
still take risks  
even through  
shes recently  
retiredand on a  
fixedincome



Persona's name

Short summary of  
the persona

listens to investing  
padcasts and  
reads subscription  
investing  
newsletters

texts with her  
state bank  
financial advisor  
or talks to them  
on the phone

onducts h  
research and  
wants to discuss  
her findig with  
her advisorer  
own market

check the  
financial market  
and reading up  
on the lebest  
financial news  
and trends

feels trust rated  
when her ideas  
or questions are  
dismissed or not  
adequately  
addressed

feels excellment  
about  
investingcousing  
her to take too  
manyrisk as she  
approched old age

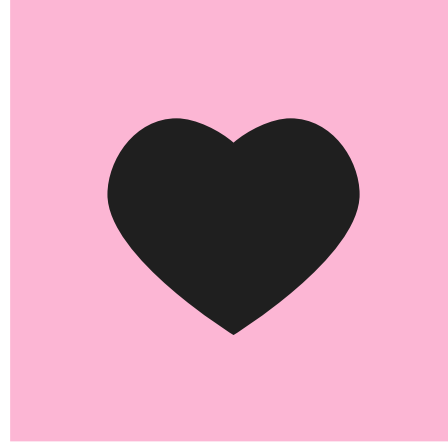
feels worried  
about  
weathering a  
major down turn  
financialcrisis or  
recession

feels joy from  
watching the  
market as an  
everyday hobby  
and wants to  
keep it that way



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?