



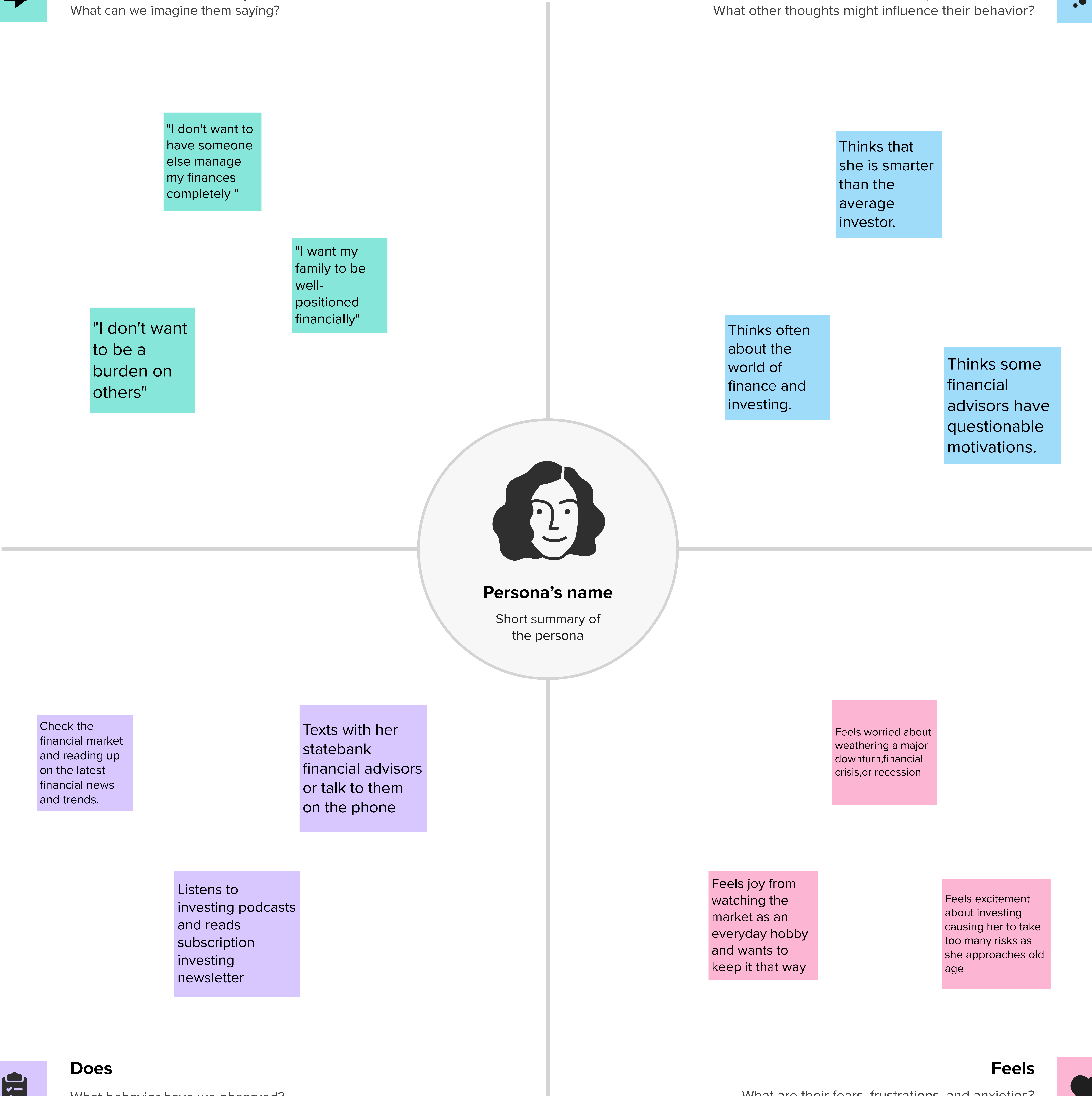
Says

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?



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

"I want my family to be well-positioned financially"

"I don't want to be a burden on others"

Thinks that she is smarter than the average investor.

Thinks often about the world of finance and investing.

Thinks some financial advisors have questionable motivations.



Persona's name  
Short summary of the persona

Check the financial market and reading up on the latest financial news and trends.

Texts with her statebank financial advisors or talk to them on the phone

Listens to investing podcasts and reads subscription investing newsletter

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

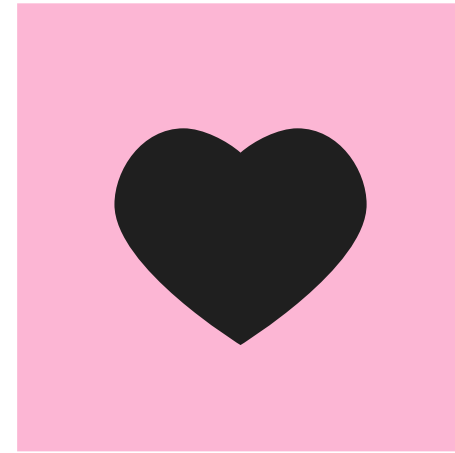
Feels joy from watching the market as an everyday hobby and wants to keep it that way

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?



Feels

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

an example