



NAME Cathy Client **INDUSTRY/SEGMENT** Tech savvy investor with multiple financial accounts and plans, currently reviews portfolio on a monthly basis and checks credit score every 2 weeks.

JOB TITLE OR FUNCTION Nurse

REPORTS TO Director of Nursing

AGE 30 **EDUCATION** B.S. Nursing

YEARS IN THIS JOB 8

TECHNOLOGY USED Multiple Client Portals, iPhone user who prefers using apps over navigating through websites. Also leverages iPad when reviewing financial accounts

TECHNICAL PROFICIENCY

Expert

Situation

A typical day in the life of your persona

Cathy is a very busy nurse that is focused on being able to retire at the age of 50 and loves to travel. She plans an annual trip to travel abroad and has a savings account just for travel.

Cathy checks her accounts on a monthly basis along with her credit score. She meets annually with her Advisor to ensure she's on track for her goals.

A typical interaction with your product

Cathy would login and all accounts would be refreshed as well as progress towards her goals.

Cathy shouldn't have to re-authenticate to any of the integrated solutions.

Cathy's score should jump out.

Notifications should be highlighted so that Cathy doesn't miss important items.

A perfect day

Cathy has one login that has multi-factor authentication where she can go to see all financial accounts along with her credit score. This portal also shows her where she is tracking against her goals and gives her recommendations for course correction if applicable.

Cathy also would have the ability to contact her Advisor through her communication preference of choice (phone, email, text or chat)

Top of Mind Issues

Cathy is growing increasingly frustrated that she isn't able to see her complete portfolio without having to login to multiple systems. Cathy also tends to forget passwords easily but is very sensitive to security so never writes

down the passwords. This leads Cathy to having to reset her passwords to most of the sites she only accesses on a monthly basis.

Other Information

What they read online and offline; member associations

Cathy reads LinkedIn articles around financial fitness and is also a very active member of the Financial Fitness Association.

Budget approval levels and ROI expectations

This has not been approved through the budget and is expected to need EC approval prior to moving forward.

How the persona is rewarded or motivated (compensation, bonus, commission, other recognitions)

Cathy loves getting recognition for her accomplishments and would love to see call-outs in an application for each goal that she meets.

Written By Jodi Bonnett **Date** 04/25/2022