

John Smith

age: 29

residence: South Carolina

education: Bachelors degree in Finance

occupation: Wealth Manager for North Western Mutual

marital status: Married



Dreams without goals will always be dreams

A quick summary of behaviors and practices like how he/she spends their day.

Comfort With Technology

INTERNET



SOFTWARE



MOBILE APPS



SOCIAL NETWORK



Criteria For Success:

Productivity and Efficiency

Needs

- Support from peers
- Healthy environment

Values

- Organization
- Good Management

Wants

- Flexibility
- Praise

Fears

- Burning Out
- Falling short of Goals