



Says

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

Feel worried about weathering a major downturn financial crisis or recession

The pandemic that began in March 2020 showed all of these issues in sharp relief: help to financially

More than budget more than investing

I say family to be well positioned financially to help finance

Thinks

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



I can think have secured investment

Controlling expenses how safe? Investment

For future financial growth

Better to have advise before investing



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Infographic
[personal finance]

Managing money saving investing setting financial goal

Texts with her debit bank financial advisor or talks to them on the phone

Listens to investing podcasts and reads subscription investing newsletters

To keep pay finance monthly

Insecured about investment

Very subjective

Pressurised

Unsafe discussing his plan



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?



[See an example](#)