



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?



Persona's name

Short summary of the persona

i dont want to have someone else manage my finances completely

i dont want to be a burden on others

i want to continue growing my wealth even during retirement

thinks often about the world of finance and investing

thinks some financial advisors have questionable motivations

thinks that she is smarter than the average investor

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

listens to investing podcasts and reads subscription investing newsletters

checks the financial markets and reading up on the latest financial news and trends

feels worried about the financial legacy she will leave to their children(and how best to live it)?

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

feels worried about weathering a major downtorn,financial crisis,or recession



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?