



Says

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

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

I trust my advisor but it needs to be an active partnership

I need to continue growing my wealth over time

I want someone there at all my milestones or when my business changes what they do to allow me to have confidence in me



Thinks

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

Thinks often about the world of finance and investing

Thinks some financial have questionable motivation

Thinks the age when one needs to stop working is not set

Thinks that she is smarter than the average investor

Thinks she can still learn a lot from the experts about the market



Persona's name

Short summary of the persona

Trust with her advisor is essential either or falls in there are the person

Is more in learning patterns and work habits rather than making decisions

Checks the financial markets and not doing it all the time. Interested in how and not why

Can look her trust that she is not going to be misled

Thinks an active partnership with her advisor is important and learning potential to understand the market

Is happy to learn from her advisor and not to be in the market and not to be in the market

Feels excited about the financial markets and not about the market

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

Feels excited about investing causing her to take too many risks as she approaches old age

Feels energized by optimizing her wealth and passing down an inheritance to her family

Feels excited by the thought of being able to do it for her family or being able to do it for her family

Feels excited about the financial markets and not about the market