



Says

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

i trusr my  
advvisor but it  
needs to  
bean active  
partnership

i woory about  
a 2008 sytle  
cash  
happening  
again

i wnat my  
famiiy to be  
well  
positionaed  
fiancially



Thinks

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

thinks that  
the is smater  
than the  
average  
investor

thinks often  
about the  
world of  
finance and  
investing

thinks the right  
advisor could  
be a good  
sounding bourd  
and ability



Persona's name  
Short summary of  
the persona

conducts her  
own market  
research and  
wants to discuss  
her finding with  
her visor

texts with her  
state bank  
financial  
advisor

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

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

feels worried  
about the  
financial legacy  
she will leave to  
their children

feels worried  
about weathering  
a major downturn  
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?