

Affluent, New Customer

"My successful career has enabled me to provide my son with the best opportunities.
I want to secure his future."



JEFF
Vice President of Technology, 52

PROFILE

I **feel** succeeding at work improves my ability to provide for my family.

I **am driven** to do my best at work, increase my influence, and build my network.

I **worry** about providing for my son's college – I want him to be able to afford the best. I also want to ensure he's taken care of if something were to happen to me. I'm also concerned about my parents' declining health.

I **want** brands that reflect my experience and accomplishments. By default, that means the brand must be innovative.

I **aspire** for my son to be successful in life and have the best opportunities. It would be nice to get married again – if it's in the cards for me. I am striving to be Chief Technology Officer within a few years.

RESEARCH HABITS

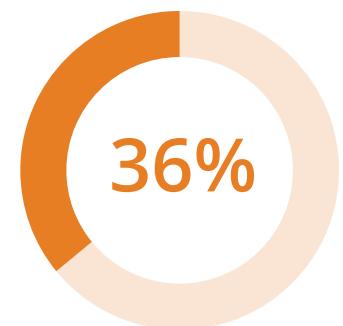
Do my own research online before making financial decisions

Relevant financial tools, online quotes and transparent content should support this.

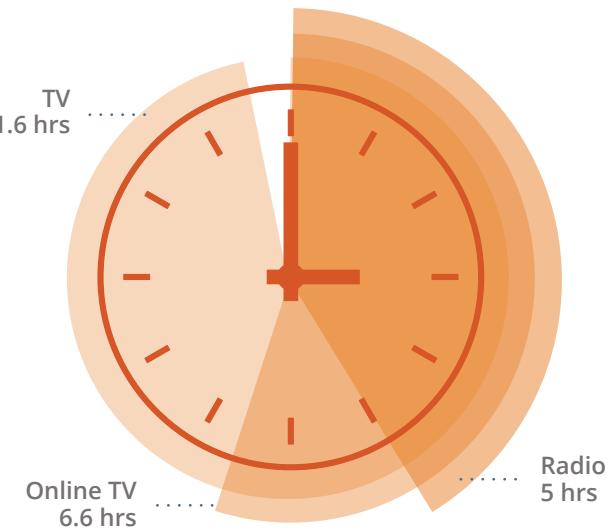


Rely on financial advice from professionals

Advice should be easy to access online, on the phone or in person. I want a seamless experience.



WEEKLY MEDIA USE



TOP 5 THINGS I DO WEEKLY ON MY SAMSUNG GALAXY S8



1. Receive SMS/
Push Notifications



2. Take Photos/
Videos



3. Look Up Maps/
Directions



4. Send/Receive
Work Email



5. Listen to Music
Stored on Device

PERSONAL

I have **strived for success** my whole life. I feel good knowing my parents are proud of me and how far I've taken the family legacy. I want that legacy to be extended to my son, David, and provide him with the **best opportunities** to have a solid future. Sometimes it's necessary for me to make sacrifices for the sake of my career advancement. I think my son understands that I do it for him.

I share custody of my son, but provide most of the financial support for him. I have **saved well** so that finances won't hold him back from picking a top-notch university. He's 13 now, so I'm glad he knows now that he can strive for the best options. It pains me that my parents have recently had to move into assisted living. They enjoyed having their own home, but I'm glad they'll receive more constant care.



WISH-FORS

Online financial tools

Online quotes

Personalized content,
recommendations

Easy-to-understand coverage
options and discounts

Seamless experience across
touchpoints

BRANDS

I like to reward myself with life's little luxuries, whether it's the car I drive or the brands that I choose. I also will spend more for **good quality** or products that **offer convenience**. I like to remain on the **cutting-edge** of new technologies.

FINANCES

While I feel financially secure, as my job demands grow, it's been difficult to stay on top of where to make the best investments. I **conduct research online**, compare my options in the market, and take a little risk for higher returns. I also want to **increase the life insurance coverage** beyond what my company offers, to ensure my son is taken care of. I have asked some of my trusted colleagues and friends to hear **recommendations** on financial institutions so I can investigate further.

SELECTION CRITERIA

Price

Value

Financial Strength

Flexible coverage options

Solid reputation

