

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?



thinks often about the world of finance and investing

i wo a 20 cras hap aga

i woory about a 2008-sytle crash happening again

thinks that she is smarter than the average investor

thinks some advisors have questionable motivations

"i dont want to be a burden on others

i trust my
advistor, but it
needs to an
active
partnership"



Persona's name

Short summary of the persona

feels worried
about weathering
a major
downturn.
financial crisis or
recession

texts with her statebank financial adviisor or talks to them on th phone

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

feels energized by optimizing her wealth and passing down an inheritance to her

feels exxcitement about investing causing her to take tooshe approaches old age many risks

listening to investing podcasts and reads subscription investing newsletters

Does

What behavior have we observed? What can we imagine them doing?



Feels



