



Says

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

I don't want to have some one else manage my finances completely

"I don't want to be a burden on others"

"I worry about a 2008-style crash happening again"



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 that she is smarter than the average investor

Thinks some financial advisors have questionable motivations



Persona's name

Short summary of the persona

Text with her statebank 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 land how best to leave it?

Feels joy from watching the market as an everyday to keep in that

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



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?