



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?

Persona's name

Short summary of the persona

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

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

"I want to continue growing my wealth event during retirement".



Thinks some financial advisors have questionable motivations

thinks often about the world of finance and investing

thinks that she is smarter than the average investor

Texts with her statebank financial advisor or talks to them on the phone

Conducts her own market research and wants to discuss her findings with her advisor

Checks the financial markets and reading up on the latest financial news and trends.

Fees an them watching the market as an everyday needby and wants to keep it that way.

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

Feel joy term watching the market as an everyday new by and wants to keep it that way.



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?