

## Jon Davis

age: 25

residence: New York, Brooklyn

education: Masters in Finance at Baruch University

occupation: Financial Adviser

marital status: Single



*The more we save the better!*

Jon spends most of his time completing his work and making sure his clients get exactly what they want. Jon is now in his second year of working for his finance firm and realizes that there is much more that he needs to learn before he can become a top financial adviser.

### Comfort With Technology

INTERNET



SOFTWARE



MOBILE APPS



SOCIAL NETWORK



### Criteria For Success:

When a client portfolio achieves its goals on time while saving plenty of money.

### Needs

- To have project self-managed
- Excellent User Experience
- Tangible Results

### Wants

- To see User feedback before a major decision
- To save as much money as possible
- Faster software to complete calculations

### Values

- Detailed planning
- Decisions backed up by data
- Thorough communication

### Fears

- Losing Money
- Disappointing Users
- Losing clientele



## Joseph Kernan

age: 24  
residence: Worcester, MA  
education: College Graduate  
occupation: Physical Therapist  
marital status: Single



*"Buying in bulk is superior"*

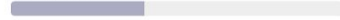
Joseph works five days a week and enjoys going out with friends on the weekends.

### Comfort With Technology

#### INTERNET



#### SOFTWARE



#### MOBILE APPS



#### SOCIAL NETWORK



### Needs

- Needs to be home quickly after work to feed his dog
- Needs to be at work by 8:00am
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### Values

- Values discipline and Honesty
- Values efficiency

### Criteria For Success:

Joseph likes to see direct results and numeric data to be satisfied with

### Wants

- Wants to be able to shop quickly
- Wants to have a supportive group of friends
- Wants a promotion at work

### Fears

- Fears not having enough free time
- Fears being late to events, work, etc.
- Fears not being able to help a client recover



## Susan Hodges

age: 40

residence: South Carolina

education: High School Diploma

occupation: Treasurer at her local church

marital status: Married with kids



### "A very busy mother of three children"

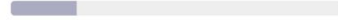
Manages her time between her three kids and having to keep her house in order.

#### Comfort With Technology

##### INTERNET



##### SOFTWARE



##### MOBILE APPS



##### SOCIAL NETWORK



#### Criteria For Success:

To accomplish everything she set out to do in the day.

#### Needs

- Her kids being happy.
- To be home in time to cook and straighten up.

#### Values

- Spending time with her family.
- Her faith.

#### Wants

- For everyone and everything to be on time.
- Some relaxation.

#### Fears

- Bad traffic.
- Having no coffee.



## John Hilbert- Meet Patel

age: 18  
residence: Spartanburg S.C.  
education: Diploma (GED)  
occupation: Full- Time Student  
marital status: Single



*Don't let anyone define you.*

- 1.Likes to wake up at 3-4pm on weekends
2. Finishes his college assignments way ahead of time
3. Likes eating different types of food
4. Likes playing Video Games
5. Coding is everything for him

### Comfort With Technology

#### INTERNET



#### SOFTWARE



#### MOBILE APPS



#### SOCIAL NETWORK



### Needs

- To attend Class on time
- Finish Assignments on time

### Values

- Honesty
- Loyalty
- Respect

### Criteria For Success:

1. Good Grades
2. Work hard
3. Concentrate in all classes

### Wants

- Video Games
- Peace and Prosperity
- Friends

### Fears

- Fears Snakes
- Bad Grades
- Heights
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