



Says

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

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

"I want my family to be well-positioned financially."

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



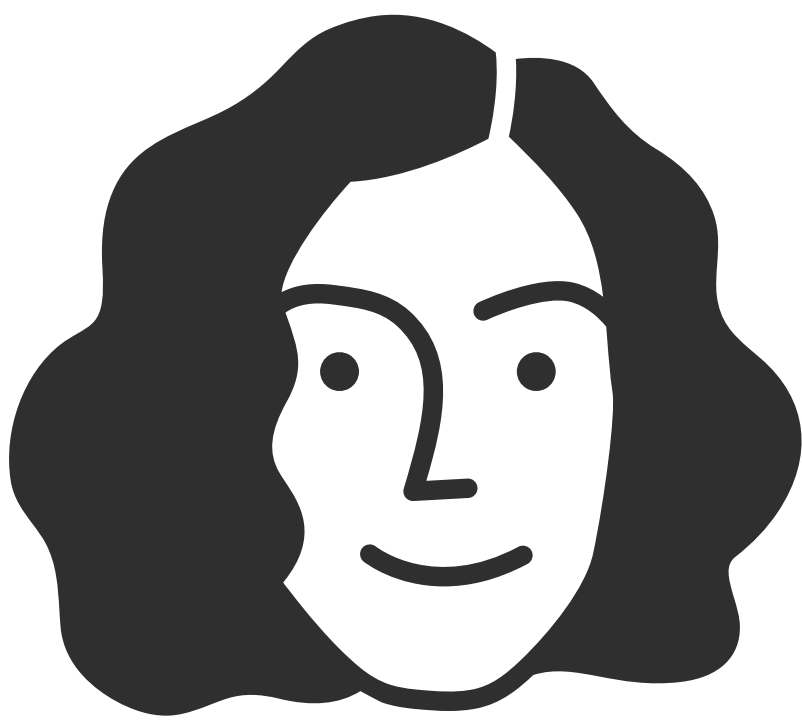
Thinks

What are their wants, needs, hopes, and dreams?
What other thoughts might influence their behavior?

I hinks some financial advisors have questionable motivations.

Thinks often about the world of finance and investing.

Thinks that she is smarter than the average investor.



Short summary of the persona

Feels exxcitement about investing causing her to take too many risks as she approaches old age.

Feels joy from watching the marker as an everyday hobby and wants to keep it that way.

Feels worried about weathering a major downturn, financial crisis, or recession.



Does

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

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

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Feels

What are their fears, frustrations, and anxieties?
What other feelings might influence their behavior?