



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

Thinks some financial advisor have questions motivational

Thinks often about the world of finance and investing

Thinks that she is smarter than the average investor

Feels by from watching the market as an everyday nneedby and wants to keep it that way

Feels energized by occomizing her wealth and passing downs an inheritance to her family.

Feel exacupement about investing casuing her to take toomany makes as the approaches old age.

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

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

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

Checks the financial markets and rending up on the lastest financial news and trends.

Texts with her statebank financial dvisor of talks to them on the phone

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



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?