TEMPLATE

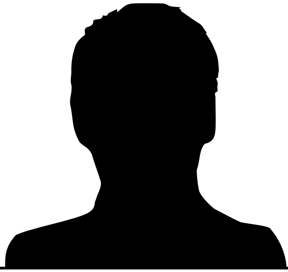
Buyer Persona Name: ______________________________

Demographics
(Age, Occupation, Net Worth, Marital Status / Family Info)

Investment Risk Tolerance
(Based on this client's stage of life, what is their expected risk tolerance?)

Relationship with Advisor
(Is this client looking to establish a long-term relationship with a primary advisor, or something more introductory?)

Short-Term Financial Goals
(What financial goals and needs are most important to this client today?)



Relationship with Technology
(What does this client's relationship with technology look like?)

Long-Term Financial Goals
(What financial goals and needs will be most important to this client in 10 years? 20 years? 30 years?)

Advice and Services
(This client would expect their advisor to provide guidance on and solutions to these important financial topics.)

Buying Process
(How does this client make purchasing decisions?)