



WaddyFletch

Persona:

3rd Generation

"Welcome to Jameson Advisors, I'm Bob Jameson Jr."

Age: 33

Title: Assistant Vice President

Family: Married, 2 young children

Location: Richmond, VA

Character: Comfortable doing what's expected

Brand Affinities:



Influencers:



Bill Gates



Bono



George Clooney

Corporate Relationships:

Reports to Senior VP Investment, Operations Committee



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Double AUM

Client: Reaffirm trust

Career: Senior Leadership Team w/in 2 years

Personal: Work/life balance

Traits:

1. Following in his father's footsteps
2. Lower risk tolerance/status quo oriented
3. Well-networked, clients probably are too
4. May have something to prove

Frustrations:

- Not enough time
- Not taken seriously by senior partners
- Firm needs more innovative stance

Biography:

- BS finance Washington & Lee
- MBA Darden School/UVA
- At firm since before grad school

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Apprentice

"I'll have to check with Mr. Jameson, but I think we can find a solution."

Age: 26

Title: Research Associate

Family: Single

Location: Columbus, OH

Character: Eager to please and lacking self-confidence.

Brand Affinities:

ESPN

backcountry.com

THE NORTH FACE

HARPOON
LOVE BEER. LOVE LIFE.

Influencers:



Mark Zuckerberg



Bernie Sanders



Max Scherzer

Corporate Relationships:

Reports to Research Manager



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Doesn't know

Client: Get to know as many clients on my team as possible

Career: Make junior advisor

Personal: Make junior advisor, find a girlfriend

Traits:

1. Looking for ways to prove him/herself
2. Buried in research or grunt work
3. Enthusiastic above all else
4. May be tech forward, open to new ideas

Frustrations:

- Lack of knowledge
- Limited access to senior advisors
- Not enough time

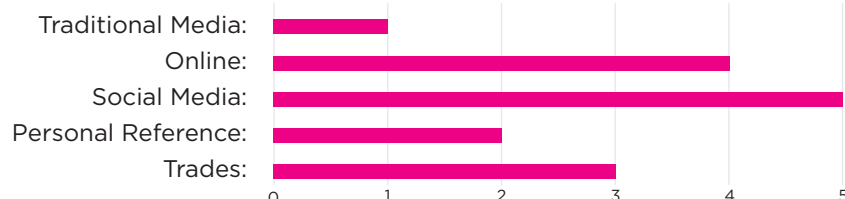
Biography:

- BS Marketing, Kenyon College

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Been Around the Block

"I'm pleased to say we outperformed the S&P once again."

Age: 42

Title: Partner

Family: Married,
1 high school child

Location: Boston, MA

Character: Responsible

Brand Affinities:



NETFLIX



Influencers:



Sheryl Sandberg



Nora Ephron



Reese Witherspoon

Corporate Relationships:

Reports to Senior VP Planning, Investment Committee



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Grow AUM 25% in 3 years, Start mentoring program.

Client: Continue to beat S&P, improve relationships

Career: Limit new clients/NIA minimum, focus on portfolios, Go solo

Personal: Get child off to college successfully, travel with husband, work-life balance

Traits:

1. Seasoned Advisor in the prime of her productivity
2. Healthy, long-term client relationships built on trust, performance
3. Pragmatic
4. May have investment minimum, client nr cap

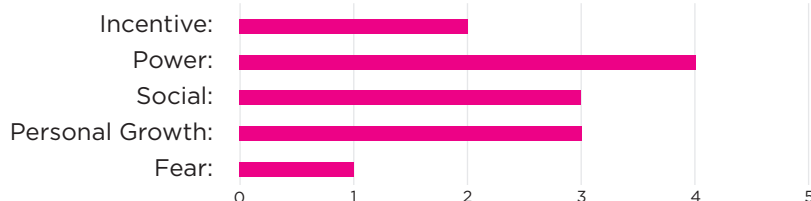
Frustrations:

- Office politics/bureaucracy
- Slow pace of firm
- Time away from family

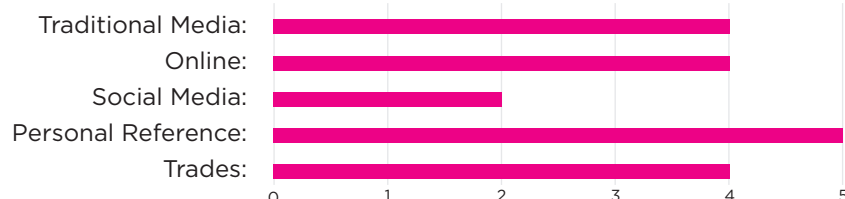
Biography:

- BA Sarah Lawrence
- Masters, Economics NYU
- Merrill Lynch Boston previously

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Captain Ahab

"I'm this close to landing Thurston Howell III as my next client"

Age: 38

Title: Senior Manager,
Emerging Markets

Family: Married, no children

Location: San Francisco, CA

Character: Gregarious, insecure

Brand Affinities:



Ferragamo

Influencers:



Elon Musk



Mark Cuban



Kobe Bryant

Corporate Relationships:

Reports to Senior VP Planning, Investment Committee



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Position firm for more active, broader financial advice (add business financing etc)

Client: Continue to provide exception return

Career: Senior Leadership team by 40, CEO by 50

Personal: Start family, retire/career change at 55

Traits:

1. Risk taker, inquisitive, turns over the rocks
2. Always searching for that next big deal/client/account
3. Low number of clients, high AUM
4. Short attention span

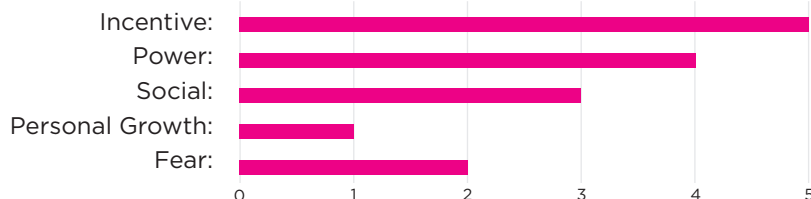
Frustrations:

- Not enough time
- Perceive lack of technological support for goals

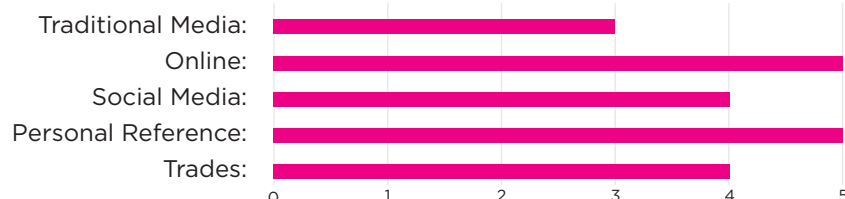
Biography:

- Bachelor's Degree, UCLA
- Worked Wall Street prior to Jameson
- FinTech start-up on the side

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Compliance Chief

"We'll need to update our compliance posture before moving forward."

Age: 46

Title: Chief Compliance Officer

Family: Married, 3 children

Location: Jacksonville, FL

Character: Colors well within the lines

Brand Affinities:



Influencers:



Michael Dell



Michael Crichton



Kai Ryssdal

Corporate Relationships:

Reports to CEO, Senior Leadership Team



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Pass upcoming compliance audit, achieve A+ rating, position for upcoming downturn

Client: Position all for upcoming downturn, take on limited number of Emerging Wealth new clients

Career: CEO on Jameson's retirement

Personal: Children to college, compete in first triathlon, finish novel

Traits:

- 1 Rules, rules, rules
2. Detail oriented, everything is backed up/recorded, value in covering every angle
3. Tech savvy
4. May be crucial part of decision-making process

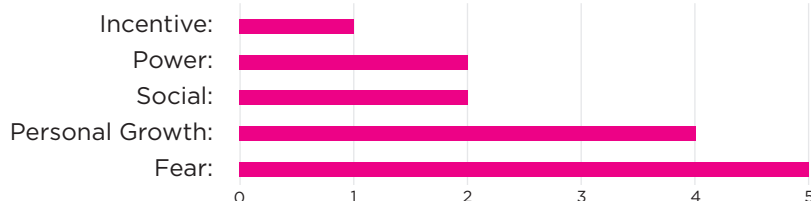
Frustrations:

- Implementing new systems
- Upcoming Compliance Review
- Inability of firm to see his value

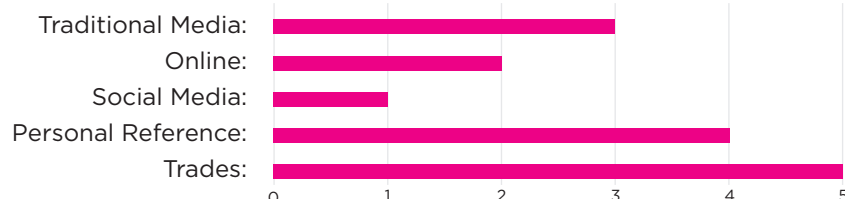
Biography:

- BA Stetson College
- MBA Vanderbilt.
- CPA, CFP

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Country Club Carl

"Yeah, I know Mike from the Club."

Age: 45

Title: Senior Vice President,
Wealth Planning

Family: Married, 4 kids

Location: Birmingham, AL

Character: Comfortable

Brand Affinities:



Mercedes-Benz



Influencers:



Danny Meyer



Rory McIlroy



Mick Jagger

Corporate Relationships:

Reports to COO, Senior Leadership Team



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Hire more of his contacts, shape next generation
Client: Continue to maintain trust, bring on second gen clients
Career: No net new clients, grow AUM 10% annum
Personal: Kids through college, set up scholarship at UA, invest in friend's restaurant

Traits:

1. Lower risk, comfortable with the status quo
2. Not an early tech adapter
3. Relies on clubs and associations for leads
4. Well-networked with like minded individuals

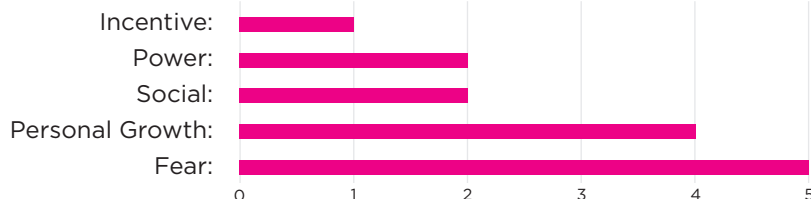
Frustrations:

- Not enough time.
- Unsure of firm's long-term goals

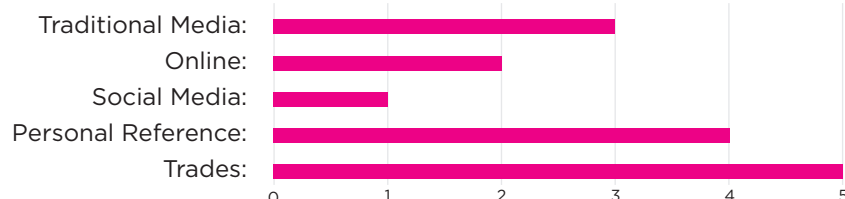
Biography:

- BS Management University of Alabama
- Worked for Father's manufacturing business until it was sold
- Brought assets to Jameson

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Deal Maker

"Let's see if we can make this work."

Age: 35

Title: Associate Partner

Family: Divorced, 1 child

Location: Dallas, TX

Character: Charming, Player

Brand Affinities:

SAMSUNG



Influencers:



Brian Armstrong



Barbara Corcoran



Cristiano Ronaldo

Corporate Relationships:

Reports to Senior VP, Investments



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Position Jameson for growth, find acquisition targets

Client: Provide unique opportunities for Return

Career: Bring in more HNW/athletes, focus on deals

Personal: Open bespoke advisory by age 4.

Traits:

1. Creative, innovative, aggressive
2. The deal process is the motivation
3. Highly-networked
4. Door opener

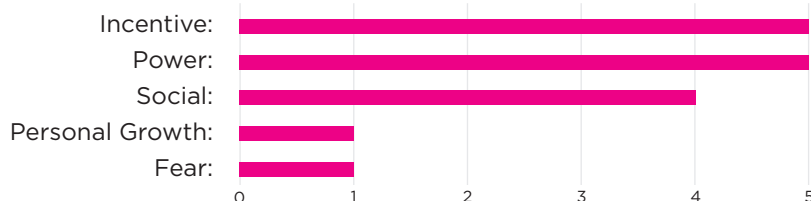
Frustrations:

- Not enough tech support
- Not enough time
- Firm may be too conservative

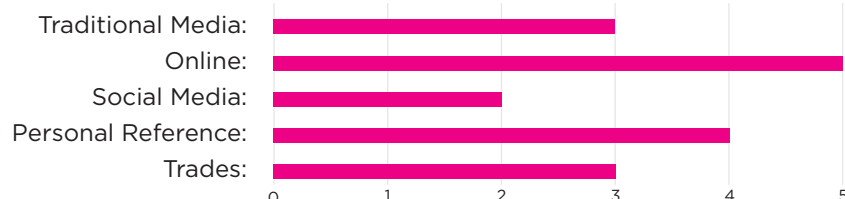
Biography:

- University of Chicago
- Played pro rugby 2 years in England
- Part owner in rugby team

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Deputy in Charge

"Mr. Jameson will be pleased to hear this."

Age: 58

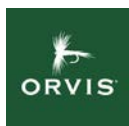
Title: Chief Operating Officer

Family: Divorced first wife, two grown children, remarried

Location: Charlotte, NC

Character: Organized

Brand Affinities:



Influencers:



Richard Anderson



Steve Balmer



John Grisham

Corporate Relationships:

Reports to CEO, Senior Leadership Team



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Continue to balance Jameson's AUM, focus on areas of weakness, broaden scope

Client: Boost branding to emphasize trust, modernize contact methods to ensure appeal to younger clients.

Career: Succeed Jameson as CEO

Personal: Retire/65, civic legacy

Traits:

1. Implements the firm's leader/founder vision or plans
2. High level of scrutiny, could be a doubter
3. Looks for best possible options (cost, efficiency, return)
4. Smart, ambitious

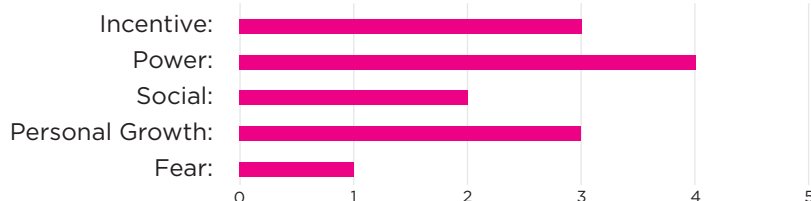
Biography:

- BA, UNC, MBA Wharton.
- CPA, CFP
- Previously CFO at mid-size bank until early 00s, then to Jameson

Frustrations:

- Clock is ticking
- Political changes hamper firms progress.

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Firm Founder

"That's an interesting concept. Let's see what my Investment Committee says."

Age: 62

Title: President, CEO

Family: Married,
2 grown children,
1 grandchild

Location: Darien, CT

Character: Astute

Brand Affinities:

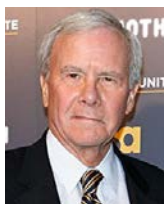


Allen Edmonds
AN AMERICAN ORIGINAL

Influencers:



Warren Buffett



Tom Brokaw



David Gergen

Corporate Relationships:

Takes counsel from BoD, Senior Leadership Team



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Ensure stable succession, strengthen management committees, strategic acquisitions

Client: Provide advisors with tools to better relationships, 2nd/3rd Gen focus

Career: Transition planning

Personal: Board of trustees at Rochester, family trust for legacy planning, endow arts

Traits:

1. Proud face of the Business
2. Strong, lasting client relationships, asset minimum, client nr cap
3. Big picture, delegates well, relies on trusted colleagues
4. Leary of change for change sake, open to persuasion if backed with proof

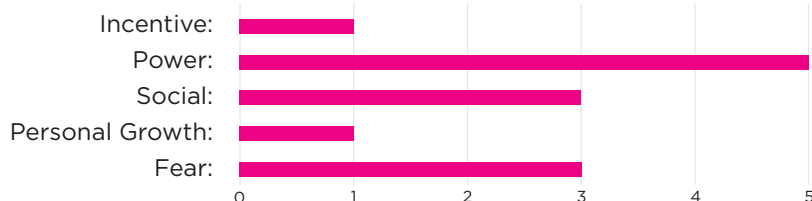
Biography:

- BA Rochester, LLM Columbia
- Blue Chip Wall Street law firms
- Investment banking
- Took clients in late 90s and started Jameson

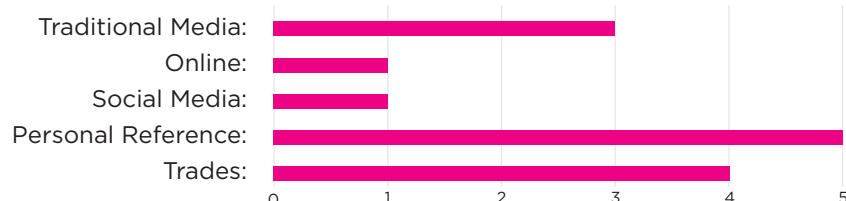
Frustrations:

- Few
- Political interference/ inconsistency

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Good Ole Boy

"I knew your Daddy."

Age: 40

Title: Senior Partner, Tax

Family: Single, long term girlfriend

Location: Louisville, KY

Character: Fortunate

Brand Affinities:



Influencers:



Nick Saban



Steven Spielberg



Peyton Manning

Corporate Relationships:

Reports to Senior VP Tax, Tax Committee



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Continue to grown AUM, match S&P, maintain reputation

Client: Maintain high degree of trust

Career: Bring on 5 new clients each year

Personal: Looking for business to invest in, not sure of FA as long term option

Traits:

1. Highly networked socially, professionally
2. May not be at firm based solely on merits
3. Content with the status quo

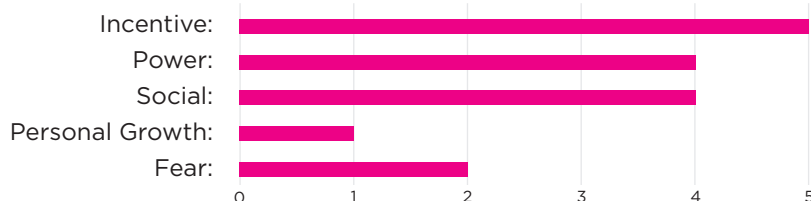
Biography:

- BS Marketing, University of Kentucky, UK Law
- CFP
- Niche personal investments with friends

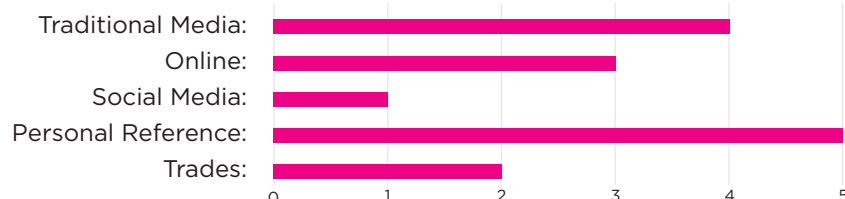
Frustrations:

- Technology changes/barriers

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Hot Shit Superstar

"I've found a new opportunity and it's working for these reasons."

Age: 35

Title: Senior Associate

Family: Single, engaged

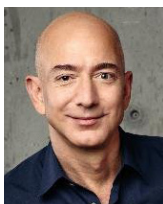
Location: Bethesda, MD

Character: Cavalier, confident

Brand Affinities:



Influencers:



Jeff Bezos



Cory Booker



Michelle Wie

Corporate Relationships:

Reports to Senior VP Investments, Investment Committee



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Grow AUM 50% in 3 years

Client: Exceed expectations

Career: Start own firm

Personal: In control of all aspects of her life, complete marathon by 40, get married

Traits:

1. Intelligent, ambitious, persuasive
2. Early adapter if it's beneficial to her
3. Not loyal to one way of doing things or one company

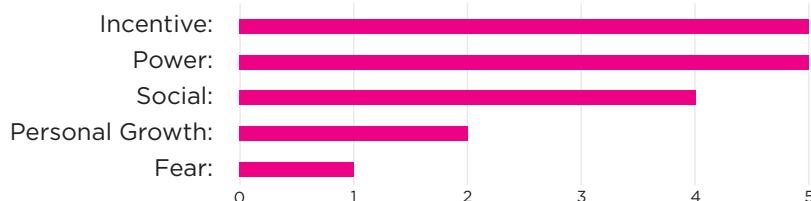
Frustrations:

- Firm is slow to act
- Perceives some doubt from senior partners
- Not a true decision maker

Biography:

- Suma cum laude, University of Maryland
- Worked in NYC banking until 2008
- Jameson since 2010

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Networker

"Mr. Jameson, meet Bob, our children play soccer together."

Age: 47

Title: Partner,
Estate Planning

Family: Married, 3 children

Location: Atlanta, GA

Character: Extrovert

Brand Affinities:



BONOBOS

Influencers:



Ted Turner



Ken Burns



George Plimpton

Corporate Relationships:

Reports to SVP, Planning. Planning Committee



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Target smaller firms/
single advisors for acquisition,
smart growth

Client: Maintain trust, conser-
vative move into other parts of
town/industries/circles

Career: SLT by 5.

Personal: Children to college,
retire at 60, sail across Atlantic

Traits:

1. Connector of people, always
knows someone wherever
he goes
2. Works all facets of their life
for personal/professional gain
3. Curious, interested, gregarious
4. Early adapter when beneficial

Frustrations:

- Not enough time
- Disorganization
- Impatient with process
inefficiencies

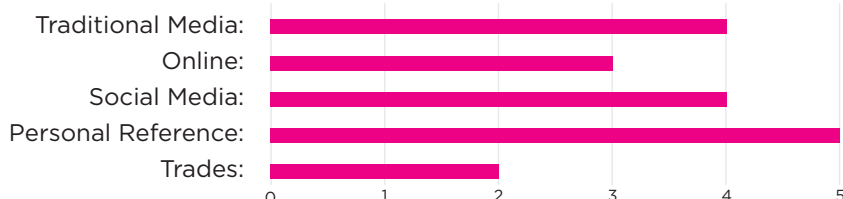
Biography:

- BS Business Administration,
Georgia Tech
- Combined LLM, MBA Emory
- Bank of America Estate
Planning 10 years

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

No Longer in the Biz

"When I was your age..."

Age: 70

Title: Founding Partner,
Advisor Emeritus

Family: Widowed, 3 grown
children, 6 grandkids

Location: Tampa, FL

Character: Venerable

Brand Affinities:



DEER VALLEY
RESORT

Influencers:



George HW Bush



Walt Disney



Doris Kearns
Goodwin

Corporate Relationships:

Emeritus, Board of Directors



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Ensure firm's
continued reputation

Client: Personal relationships
continue

Career: Wind down accounts,
pass on to son, bring in 2nd gen

Personal: Stay involved, mentor
new associates

Traits:

1. Emeritus status with the firm,
most likely retired
2. May directly manage a small
number of accounts
3. Provides advice to firm when
asked or thinks he should
4. Strong relationships

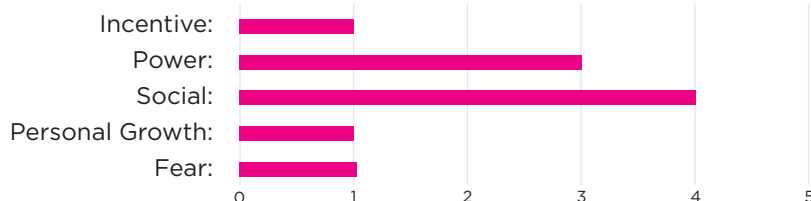
Frustrations:

- Rapid technology changes
- May not be heard by firms day
to day managers

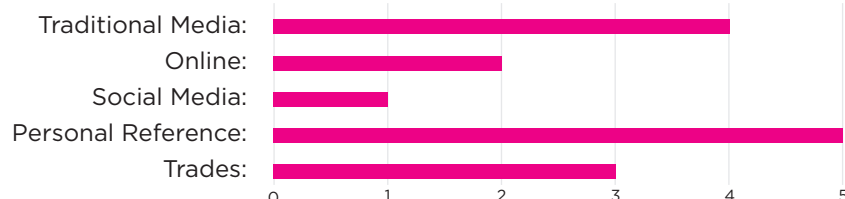
Biography:

- BA Tulane
- CFO at 3 businesses later sold
- CFP for 20 years

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





Age: 42

Title: CFP, Head of Analytics

Family: Single

Location: Hoboken, NJ

Character: Bookish

Brand Affinities:

amazon



TESLA

Influencers:



Elon Musk



Steven Jobs



Shankar Vedantam

WaddyFletch

Persona:

Computer/Data Geek

"Based on the 12-year performance trends of these 36 small cap mutual funds..."

Corporate Relationships:

Reports to CEO, Technology Investment Committee



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Out-perform competition/S&P, bring all systems up to best-in-class

Client: Maintain balance, ensure defensive positioning. Zero mis-steps

Career: Transition to Senior Leadership team, consider leaving with a partner

Personal: Begin to focus on personal life, purchase house

Traits:

1. Carefully considers new products/services
2. Buried in the numbers
3. Balanced portfolios based on proof
4. Likes to be right, takes risk only when he is certain

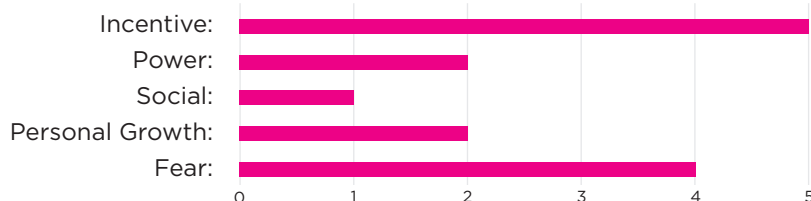
Biography:

- BCE, University of Wisconsin
- IT career at UBS

Frustrations:

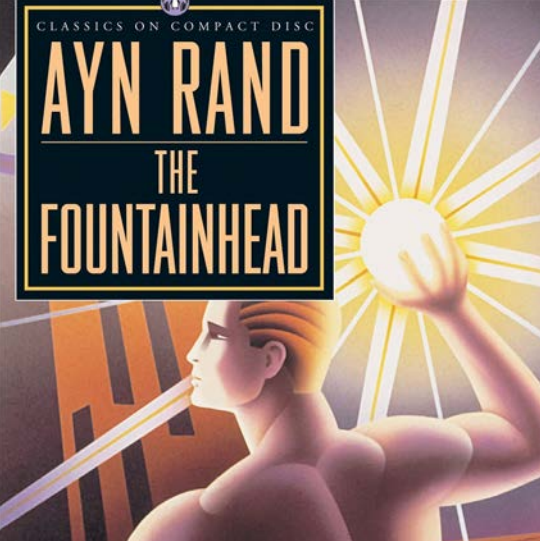
- Slow adoption of tech at firm
- Market volatility

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





Age: 39

Title: Certified Financial Planner, Advisor

Family: Married, husband in firm, no kids

Location: Raleigh, NC

Character: Affected

Brand Affinities:



Influencers:



Deepak Chopra



Ayn Rand



Michael Jordan

WaddyFletch

Persona:

Pass the Kool-Aid

"Here at Jameson, we recommend the following approach."

Corporate Relationships:

Reports to Senior Partner.



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Ensure moderate approach to AUM, steer away from high risk

Client: Maintain trust, demonstrate reliability

Career: Make partner, take leadership in compliance

Personal: Work/life balance, children, keep working

Traits:

1. Playbook is right out of Finance course or Firm leadership's notes
2. Not interested in new ideas unless mandated or formally adopted
3. Matches the S&P every time
4. Has a checklist of client "must haves"

Frustrations:

- May not be taken seriously
- Needs a "win"

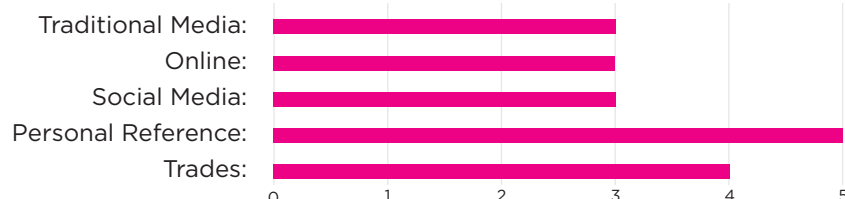
Biography:

- BA, Davidson
- MBA, UNC
- Worked in Finance (banks, SaaS) prior

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

2nd Career for Service

"I want to see my clients achieve their personal best through smart planning."

Age: 60

Title: Advisor

Family: Long term partner, no kids

Location: Denver

Character: Nurturing

Brand Affinities:

Etsy



Influencers:



Margaret Atwood



Oprah Winfrey



Serena Williams

Corporate Relationships:

Reports to Partner



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Ensure all clients treated equally, compliance

Client: Ensure clients meet their goals

Career: Continue providing best possible options

Personal: Maintain optimal work/life balance

Traits:

1. Altruistically motivated to care for clients' needs regardless of AUM
2. May be disproportionately concerned with Retirement and End of Life issues
3. Will nurture accounts through several life stages
4. Well rounded, low risk approach

Frustrations:

- Greater awareness of external resources
- Rapidly changing technology.

Biography:

- BA Smith College
- Career in banking and insurance
- Sold business, returned to advise

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Trader Joe

"This afternoon's market fluctuations triggered a rebalance."

Age: 40

Title: Senior Investment Specialist

Family: Divorced, 2 children

Location: Westchester, NY

Character: Restless

Brand Affinities:



Influencers:



Adam Levine



Stephen King



Michael Bloomberg



Brian Chesky

Corporate Relationships:

Reports to SVP Investments, Technology Committee



Corporate Influence



Corporate Authority



Fortamus Advocate

Goals:

Corporate: Broaden firm's services, take more studied risk

Client: Provide highest returns possible

Career: 4 more years at Jameson, take highest NW clients and start on his own

Personal: Travel and cycle, work part time

Traits:

1. Hands-on portfolio management
2. Highly transactional
3. Will jettison something if it doesn't work to his advantage
4. Amortizes risk over wide range of investments

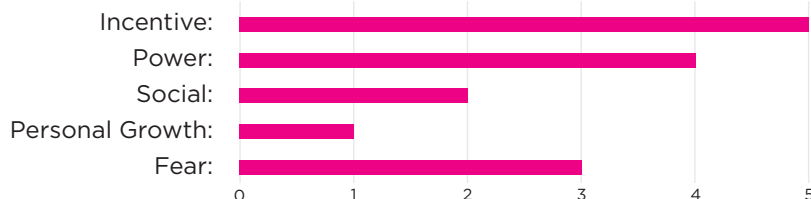
Frustrations:

- Firm too conservative
- Not enough time

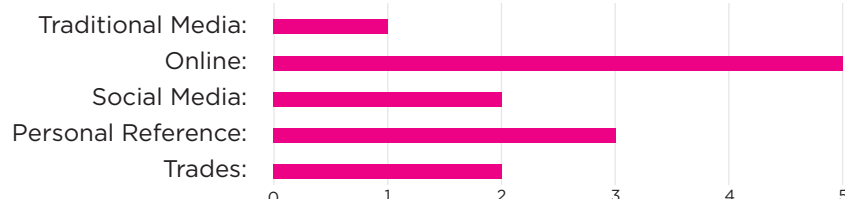
Biography:

- BS Syracuse
- Professional cyclist out of college
- Trader on Wall Street 5 years

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)





WaddyFletch

Persona:

Young & Hungry

"I'd love to give that a try."

Age: 31

Title: Associate,
Certified Financial
Planner

Family: Newly wed,
wife pregnant

Location: Chicago, IL

Character: Diligent

Brand Affinities:

SHINOLA
DETROIT



HONDA
ACCORD

Influencers:



Simon Sinek



Drake



Larry Page

Corporate Relationships:

Reports to SVP Investments, Technology Committee



Corporate
Influence



Corporate
Authority



Fortamus
Advocate

Goals:

Corporate: Grow AUM, position
for acquisition

Client: Grow client base and
continue to provide outstanding
service

Career: Senior Partner,
make Investment Committee,
start own firm

Personal: Work/life balance

Traits:

1. New to firm or career
2. Aggressively building AUM
3. Looking for any advantage
4. Younger client base, tech
forward, open to new ideas

Frustrations:

- Not enough time
- Better tech
- Advancement

Biography:

- BS Management,
University of Wisconsin
- Worked at Madison, WI
accounting firm prior

Motivations (1 = lowest, 5 = highest)



Preferred Channels (1 = least, 5 = most)

