



# Advisor Customer Persona 1

## Persona:

# Steady Eddie

"It's not how much money you make, but how much money you keep, how hard it works for you, and how many generations you keep it for."

**Age:** 54

**Title:** Partner in a Law Firm

**Family:** Married,  
3 children

**Location:** Richmond, VA

**Character:** Comfortable doing  
what's expected

## Brand Affinities:



## Influencers:



Bill Gates



Bono



George Clooney



Peyton Manning

## Goals:

**Business:** Grow firm business for the benefit of successors

**Client:** Diversify into new verticals

**Career:** Focus on putting the right successors in place

**Personal:** Work/life balance, Become more involved at the church, retire by 60

## 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

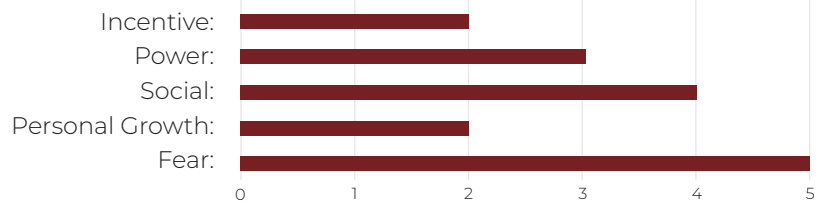
## Frustrations:

- Not enough time
- Money in multiple places
- Fragmented
- Practice needs updated technology

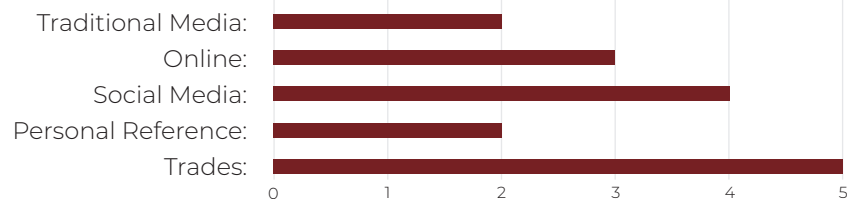
## Biography:

- B.A. from Washington & Lee
- J.D. from University of Virginia

## Motivations (1 = lowest, 5 = highest)



## Preferred Channels (1 = least, 5 = most)





# Advisor Customer Persona 2

## Persona:

# Driven Diane

“People respond well to those that are sure of what they want.”

**Age:** 46

**Title:** Senior Vice President, B2B Sales at IBM

**Family:** Divorced, 1 high school child

**Location:** Atlanta, GA

**Character:** Ambitious

### Brand Affinities:



### Influencers:



Sheryl Sandberg



Gayle King



Reese Witherspoon



Sara Blakely

### Goals:

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

**Client:** Continue growth strategy, improve partner relationships

**Career:** Limit new clients/focus on becoming SVP Global Sales

**Personal:** Get child off to college successfully and travel more with boyfriend

### Traits:

1. Seasoned advisor in the prime of her productivity
2. Healthy, strong relationships built on trust, performance
3. Pragmatic
4. Highly organized

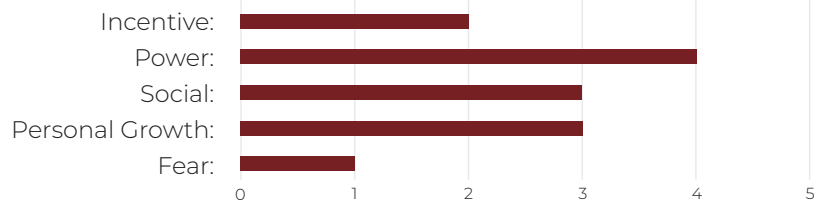
### Frustrations:

- Office politics/bureaucracy
- Slow pace of corporate
- Travel, time away from kid

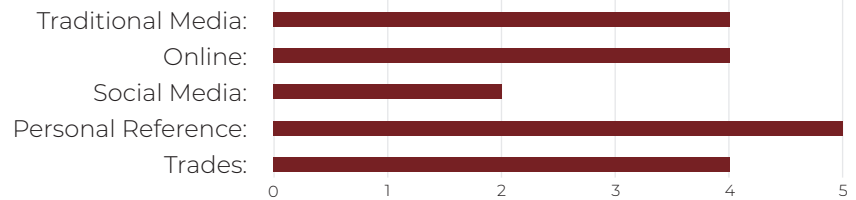
### Biography:

- BA, Mechanical Engineering Georgia Tech
- MBA, Emory

### Motivations (1 = lowest, 5 = highest)



### Preferred Channels (1 = least, 5 = most)





# Advisor Customer Persona 3

## Persona:

# Hard Working Harris

“Perseverance is the hard work you do after you get tired of doing the hard work you already did.”

**Age:** 45

**Title:** Owner, Central AL Heating and Cooling

**Family:** Married, 1 kid

**Location:** Birmingham, AL

**Character:** Practical

## Brand Affinities:



## Influencers:



George Bush



Phil Mickelson



Mark Cuban



Nick Saban

## Goals:

**Corporate:** Hire more of his contacts, corporate accounts

**Client:** Continue to maintain trust, bring on second gen clients

**Career:** Grow 20% annually, Acquisition in southern TN

**Personal:** Kid through college, retire with vacation properties

## Traits:

1. Lower risk, comfortable with the status quo
2. Not an early tech adopter
3. Relies on word-of-mouth for leads
4. Well-networked with like minded individuals

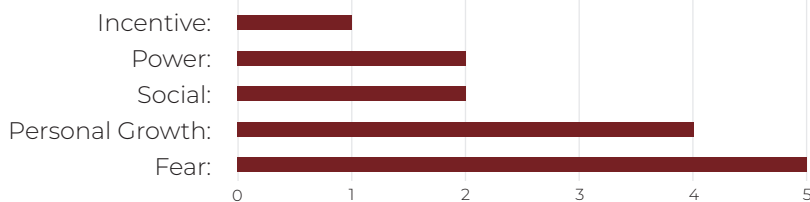
## Frustrations:

- Not enough time
- Unsure of how to get to long-term goals
- Consistent/reliable employees

## Biography:

- Two years of community college/ no B.A.
- Took over business from father

## Motivations (1 = lowest, 5 = highest)



## Preferred Channels (1 = least, 5 = most)

