Ideal client persona builder.

Use this template to create an investor persona using the data from your book of business. Think about a group of clients that you want to replicate and complete the inputs on the front page to summarize their demographics, motivations, financial knowledge/attitude, interests, and communication preferences. On the back, use your ideal client inputs to map out how your ideal client will inform your approach to planning, investments, client service, and business development to take a client-centric approach to service, retention, and growth.

START HERE

1 Demographics

Age/life stage

Gender

Marital status

Profession

Employer

Investable assets

2 Motivations

Primary challenges/needs

What is financial success?

Makes decisions easily?	
Interested in details?	

3 Financial knowledge/attitude

Type of investor profile

Validator	
Delegator	
Family Steward	
Maven	

What is their attitude toward investing?
(long/short-term, goals/performance-based?)

Where do they get financial information?
(friends, family, TV/radio, advisor, etc.)

What is their demeanor about finances?
(collaborative, seeking support, too busy)

4 Interests

How do they spend time?

With whom do they spend time?

Do they belong to any social clubs/groups?

What are their hobbies?

5 Communications

How often do they want communication?

Preferred method of communication?

How and how often do they want to meet?

Do they enjoy catching up or want to get down to business?

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Persona name:

YOUR PERSONA-CENTRIC APPROACH 6 ··· 7 ··· 8

	Client service model	Planning/investments	Business development
An image of your ideal client persona			
Processes			
Technologies			
Deliverables			