| **Client Persona Template** | **Details** |
| --- | --- |
| **Persona Name** | Margaret Stevens |
| **Demographics** |  |
| **Age** | 67 |
| **Gender** | Female |
| **Where they live** | Suburban area near a major city (e.g., Westchester County, NY) |
| **Education Level** | Master's Degree in Business Administration |
| **Family** | Married, 3 adult children |
| **Retired** | Yes |
| **Job title if still working** | Former Senior Vice President of a Fortune 500 company |
| **Key information about their company/employer if still working** | N/A |
| **Details about their role if still working** | N/A |
| **Salary / household income** | $500,000+ annually from investments, pensions, and social security |
| **Religion** | Christian (Episcopalian) |
| **Psychographics** |  |
| **Primary financial/life goal** | Preserve wealth for future generations while maintaining a comfortable retirement lifestyle |
| **Secondary financial/life goal** | Support philanthropic causes, particularly in education and healthcare |
| **How you help achieve these goals** | Provide a comprehensive estate plan, tax-efficient strategies, and regular portfolio reviews to ensure goals are met |
| **Primary challenge in achieving their goals** | Navigating complex tax laws and ensuring sufficient income for a long retirement |
| **Secondary challenge in achieving their goals** | Balancing wealth preservation with moderate growth to outpace inflation |
| **How you help solve these challenges** | Regularly reassessing the financial plan and adjusting investments based on market conditions, tax strategies, and personal circumstances |
| **Primary personal values** | Family, security, philanthropy |
| **What motivates their behavior** | Ensuring financial security for her family and making a meaningful impact through charitable giving |
| **Political Party affiliation** | Moderate to Liberal (votes based on issues rather than strict party alignment) |
| **Other “tribe” they may feel an attachment to** | Women’s investment clubs, local philanthropic organizations |
| **Lens through which they view the world** | Practical and forward-thinking, with a focus on legacy and long-term impact |
| **Mindset** | Abundance with a focus on preservation |
| **How they spend their free time** | Traveling, volunteering, attending cultural events, spending time with family |
| **Other** |  |
| **Common objections they may have during the sales process** | Concern about fees, skepticism about the advisor’s ability to manage complex wealth strategies |
| **Online behavior** | Frequent visitor of financial news websites (e.g., Bloomberg, Wall Street Journal), engages in online philanthropy groups, active on LinkedIn |
| **What would make their life easier that you can help them with** | Simplified and streamlined financial reporting, a trustworthy and proactive advisory relationship |
| **Describe a day in the life of this ideal client** | Starts the day with a morning walk, reads the financial news, checks in on investments, volunteers at a local charity, and ends the day with a family dinner or cultural event. |
| **What key marketing messages/phrases will catch their attention** | "Preserve your wealth for future generations," "Strategic planning for a comfortable retirement," "Make a lasting impact with your wealth." |
| **Emotional triggers that cause them to want to reach out and work with a financial advisor** | Concern about market volatility, desire to ensure the family’s financial security, changes in tax laws, or significant life events (e.g., birth of a grandchild) |
| **Decision criteria they use to determine which financial advisor they will hire** | Reputation, expertise in wealth management, personalized service, transparency on fees, proven track record with high-net-worth clients |
| **Your value proposition to this ideal client** | We offer personalized, sophisticated wealth management solutions that align with your values and goals, ensuring your wealth serves your needs today while leaving a lasting legacy. |
| **Best way to reach them** | Email, phone calls, invitations to exclusive seminars or events, articles in financial periodicals they trust, referrals from peers or trusted advisors |