**Client Persona Template**

Directions: This exercise is designed to help you clarify what your ideal client looks like. You might have 2 or 3 separate profiles for your ideal clients. Give each one a name and answer the following questions about them.

**Persona Name: (e.g., come up with a personal name that might be reflective of your ideal client)**

**Demographics**

* Age:
* Gender:
* Where they live (geographic area, urban/suburban/rural):
* Education Level:
* Family (married, single, divorced, widowed):
* Retired (Yes or no):
* Job title if still working:
* Key information about their company/employer if still working (size, type, etc.):
* Details about their role if still working:
* Salary / household income:
* Religion:

**Psychographics**

* Primary financial/life goal:
* Secondary financial/life goal:
* How you help achieve these goals:
* Primary challenge in achieving their goals:
* Secondary challenge in achieving their goals:
* How you help solve these challenges:
* Primary personal values:
* What motivates their behavior:
* Political Party affiliation:
* Other “tribe” they may feel an attachment to:
* Lens through which they view the world:
* Mindset (scarcity, abundance, fixed, growth):
* How they spend their free time:

**Other**

* Common objections they may have during sales process:
* Online behavior (what websites do they frequent, are they social online):
* What would make their life easier that you can help them with:
* Describe a day in the life of this ideal client (think about their daily life, stresses, joys, etc., will help you think empathetically):
* What key marketing messages/phrases will catch their attention:
* Emotional triggers that cause them to want to reach out and work with a financial advisor:
* Decision criteria they use to determine which financial advisor they will hire:
* Your value proposition to this idea client:
* Best way to reach them (email, phone, text, periodicals they read, clubs where they socialize, events, etc.):