PERSONA WORKSHEET

1

CLIENT PROFILE

Name: Age: Education:

2

DAY IN THE LIFE

Describe their typical day relevant to their finances. (Focus on behavior patterns e.g. check mobile app)

Notes:

3

JOBS TO BE DONE

Top Jobs that client needs to get done with their finances:
How are they doing right now?
How is that working?

Notes:

4

THINK SEE DO FEEL CHECKLIST

THINK

What is there point of view on personal finance investing?
What do they like or dislike about it?
How would they like it to be?

Notes:

SEE

What influences/informs them about about financial planning?
Where do they get their information? Press/Media?

Notes:

FEEL

What are the underlying emotional drives regarding
How do these feelings influence what they do?

Notes:

DO

Try to see them in action (this may be hard to do!)
Home office-how they file, and manage their investments

Notes:

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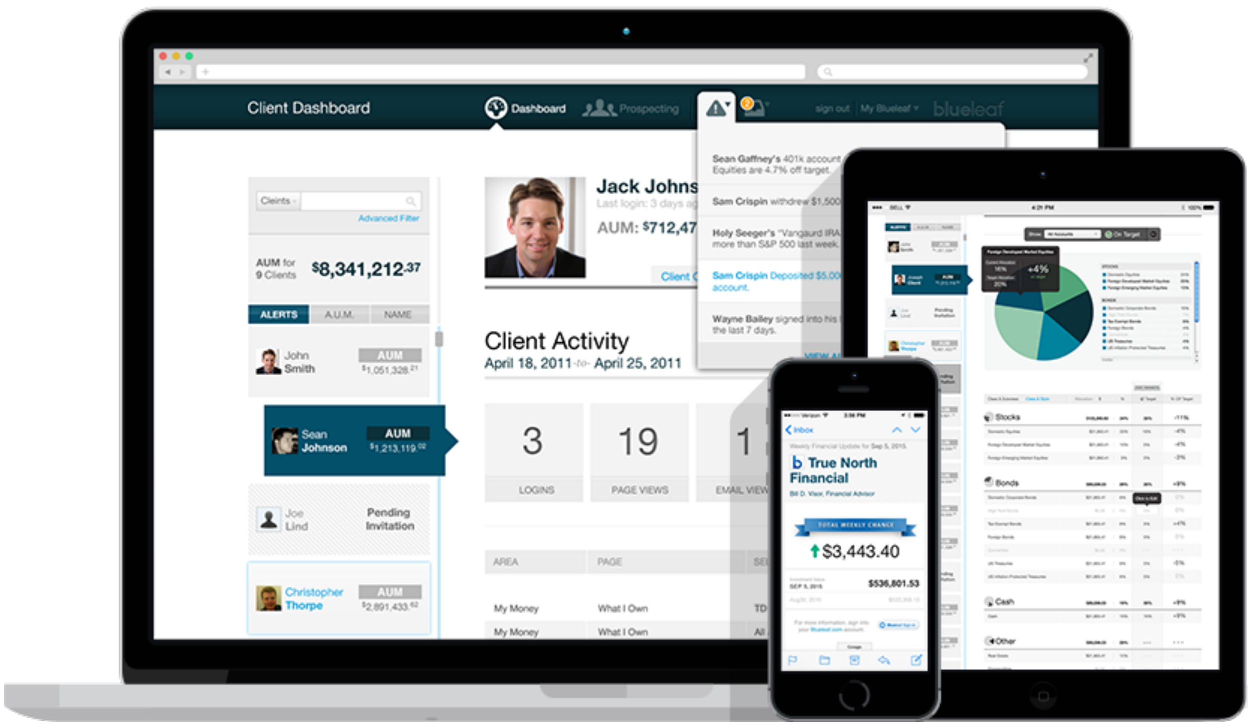
Win More Clients, Grow Current Clients, Drive More Referrals

Financial Relationship Management Software

We leverage client financial information to help financial advisors build profitable relationships.



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Do more for your clients, with our simple integrated components and workflows to help you grow financial advisory relationships.

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Close like a boss. Build trust and win clients faster by easing prospects through your funnel.

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Find ALL the assets. Our unique onboarding process will uncover assets no matter where they are.

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Encourage clients. Automatically track clients' savings toward goals and help them along.

Client Communication

Show clients your value. Automated communications that build client confidence.

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Know before they do. Track assets anywhere automatically so you know BEFORE your clients.

Client Portal

Open 24 hour/day. World class advice now includes world class access and transparency.

Account Aggregation

See it, service it, grow. With access to over 21,000+ institutions you'll see it all.

Performance Dashboards

Reports that build relationships. Traditional reporting doesn't do it. But our dashboards do.

Client Support

You're NOT the Geek Squad. Why should you support client tech? You shouldn't so we do.

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