

# BUILDING YOUR CLIENT AVATAR

## DEMOGRAPHICS

How old are they?

Where do they live?

What's their marital status?

What level of education have they completed?

What is their job title?

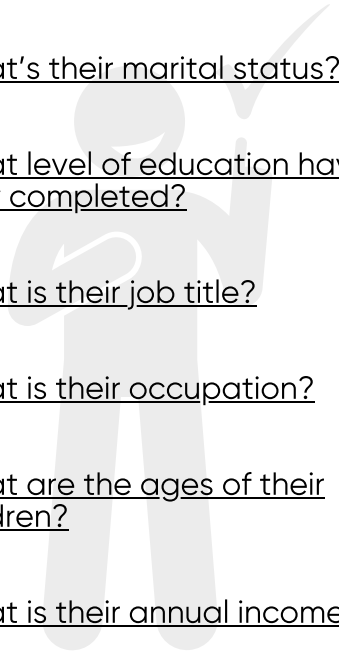
What is their occupation?

What are the ages of their children?

What is their annual income?

How much do they have in investable assets?

What is their net worth?



## NEEDS

What are they trying to achieve by hiring you?

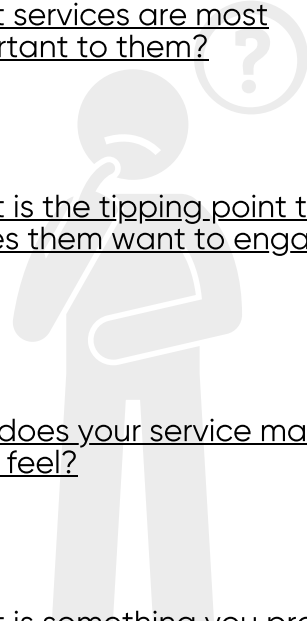
What services are most important to them?

What is the tipping point that makes them want to engage you?

How does your service make them feel?

What is something you provide these clients that your competition does not?

To what extent do they leverage your technology?

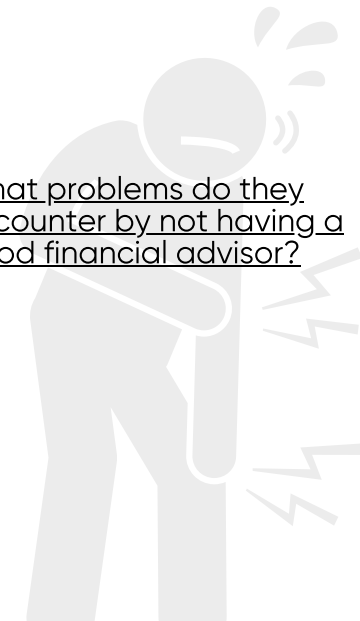


## PAIN POINTS

What worries them the most?

What problems do they encounter by not having a good financial advisor?

What challenges are common with their stage of life?



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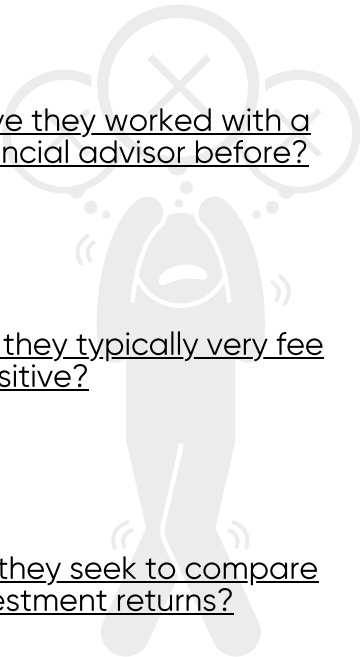
## RELUCTANCE

What is the most common objection they have?

Have they worked with a financial advisor before?

Are they typically very fee sensitive?

Do they seek to compare investment returns?



## LIFESTYLE

Where do they spend their time?

What brands do they like most?

Do they play any recreational sports?

What conferences do they attend?

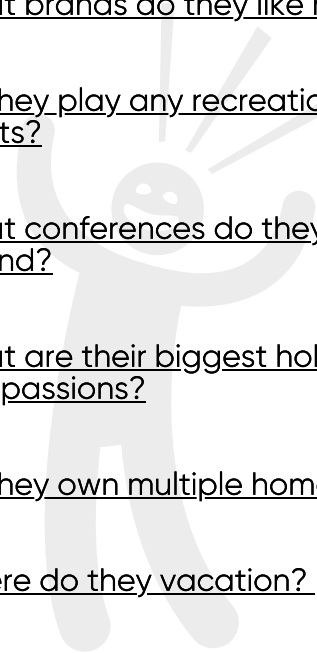
What are their biggest hobbies and passions?

Do they own multiple homes?

Where do they vacation?

What's their favorite restaurant?

Do they support any charities?



## MEDIA

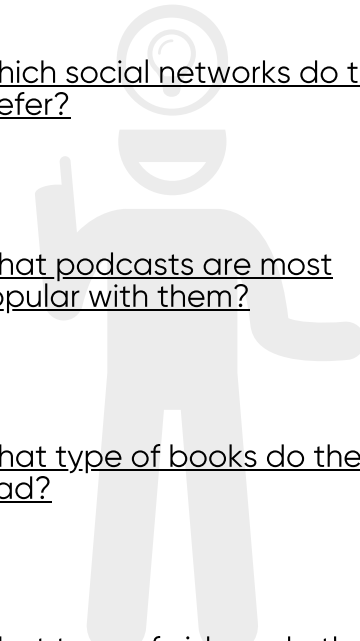
What websites do they frequent?

Which social networks do they prefer?

What podcasts are most popular with them?

What type of books do they read?

What type of videos do they watch online?



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Once you've answered all the above questions, give your avatar a name. We know that sounds cheesy, but it really helps to bring your avatar to life and streamlines internal communication.

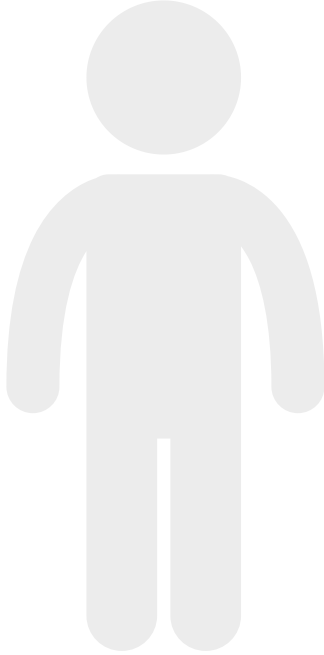
Here's a quick example:

Billy Business Owner is 55 years old, married, and has kids in college. He owns a thriving local business and is heavily involved in the community. On the weekends, you'll often find him playing golf at XYZ Country Club or having dinner at ABC restaurant.

Financially, he's doing quite well, earning \$500,000 per year and has investable assets of \$2 million. He's nearing a point where his kids are out of the house, but may soon be caring for aging parents. He has multiple financial advisors, is conscious of the fees he pays, and values investment returns over financial planning.

In his down time, he enjoys Ted Talks and listening to NPR, especially on topics of politics and running a small business.

## MY CLIENT AVATAR



Craft your Client Avatar in the space provided! →