Ideal Client Persona Builder

The Ideal Client Persona Builder template is helpful when your firm is trying to identify the investors with whom your firm has the best fit. This can be done before serving a new prospect persona or to determine similar characteristics of your top clients. It is helpful to think about a group of clients 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.

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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

Career Stage	
Exploration	Entry to mid-level with minor responsibilities.
Mid-Career	Stability, specific skill set has been developed.
Late-Career	Less advancement with minimal job changes.
Retirement	Not working, or in a part-time role.

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 communications?

How and how often do they want to meet?

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

Ideal Client Persona Builder

Persona Name:

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	Client Service Model	Planning/Investments	Business Development
An image of your ideal client persona:			
Processes			
Technologies			
Deliverables			