

Rick

THE REASSURANCE SEEKER

FAMILY MAN

CARING

PRACTICAL

“ I want to feel secure in my financial future for my wife and kids without having to become an expert.

AGE 52

WORK Psychiatrist

FAMILY Married, 2 adult children

BIO

Rick has always made plenty of money to support his family and always set aside a healthy amount into a savings account. Now that Rick is starting to think about retirement, he's looking at his finances more closely and wants to make sure he, his wife and kids are taken care of for years to come, and to get a better idea of when he can plan to retire. Aside from his 401k, Rick hasn't ventured far into the investment world and doesn't know where to start, but sees the value.



Rick

THE REASSURANCE SEEKER

PRACTICAL

CARING

FAMILY MAN

Goals

- Better Understand the financial investing world
- Feel confident his family has a financial plan for his retirement and the next 20+ years
- Find a financial advisor who educates and involves him

Frustrations

- Understanding investing is overwhelming without a background in finance
- Evaluating companies is difficult when you don't know how to compare them

Awareness of Fisher

Not at all familiar with Fisher due to lack of experience in the industry.

MOTIVATIONS

Family



Future



Social Status



Security



Wealth



DIGITAL EXPERIENCES

News



Social



Research



Entertainment (e.g., Netflix, Hulu)



Banking



Managing Investments



RICK'S PERSONALITY

Creative



Curious



Trusting



Decisive



Logical





Rick
THE REASSURANCE SEEKER

PRACTICAL

CARING

FAMILY MAN

IDENTIFY



RESEARCH



NARROW



CONNECT

Identify the need for help

Initial information gathering

Narrow down options

Connecting with an advisor

Feeling

Knows he wants to protect his family but wants to draw on a more experienced team to ensure he's on the right path.

Overwhelmed by the number of choices available and his lack of comfort and expertise in the category.

Unsure of whose advice to trust. Wants validation that a financial partner will deliver.

Unsure of the process. Wants to hear the right decisions are being made on his behalf.

Doing

Discussing the idea of financial advisors with family and friends. Asking for advice. Reading about finance and options.

Looking for financial websites.
Searching for reviews.
Looking at investing blogs.
Talking to family and friends about advisors.

Seeking out detailed information on financial partners. Having initial discussions with prospective options.

Meeting with an advisor and preparing to hand over assets.

Key Needs

Gather a list of potential companies for consideration.

Determine evaluation criteria and begin to assess initial options

Finding a financial partner that will educate and keep him involved.

A successful onboarding/kick-off meeting.

Touchpoints

Paid and organic search.
Website (company info).
Content marketing.
Current clients.

Website (investing info).
Current clients.
Reviews/ratings.

Website (advisor info).
Call center.
Offices.

Advisor.
Website (new client info).

Opportunities

Create a strong "Why Fisher?" section to establish trust.

Content delivering education on the category and Fisher's approach and related benefits.

Policies of advisors to humanize the process.

Simple, guided content to jumpstart the transition process.