

Buyer Persona **Worksheet**



Persona Name: _____

BACKGROUND

Education:

Position/job:

Marital Status:

Kids:

DEMOGRAPHICS

Male/Female:

Age:

Income:

Geographic Location:

PERSONALITY

Communication

Preferences:

Investment Styles:

Risk Tolerance:

Buyer Persona **Worksheet**



Persona Name: _____

LIFESTAGE:

INVESTMENT GOALS:

FINANCIAL CHALLENGES & PAIN POINTS

COMMON OBJECTIONS:

MARKETING MESSAGING: