Financial Services High-Value Client Persona

Name

Sarah Thompson

Age

48

Location

New York, NY

Marital Status

Married, 2 Children

Occupation

Senior Executive, Technology Firm

Annual Household Income

$600,000+

Investable Assets

$3.8M

Goals & Aspirations

- Build generational wealth
- Maintain current lifestyle into retirement
- Optimize tax efficiency
- Secure high-quality education for children
- Increase philanthropic giving

Challenges & Pain Points

- Time constraints for managing finances personally
- Navigating complex tax and estate planning rules
- Preserving wealth amidst market volatility
- Trust in financial advisors and transparency

Preferred Services

- Comprehensive wealth management
- Custom investment portfolios
- Tax planning
- Estate and legacy planning
- Family office services

Decision-Making Factors

- Reputation & expertise of financial institution
- Personalized solutions and proactive advice
- Direct access to advisors
- Transparent fee structure
- Strong digital experience

Communication Preferences

- Quarterly in-person/virtual reviews
- Detailed but concise reporting
- Direct phone/email for urgent needs