

Lucy Daniels

Checking,

Savings,

Heloc, CD

Age: 63



## Traits



Tech - wary

Reflective

Cautiously Independent

Integrity

Takes the long view

## Beliefs

- \* In-person interactions are far more efficient, appreciates human interaction and service
- \* Transactions online are unsafe
- \* Behind on technology, can't relate
- \* Transparency is paramount- wants to know exactly what they're getting into

## Goals / Needs

- \* Needs information given to them in palpable manner
- \* Requires utmost trust/justification to complete internet transactions
- \* Ensure I'm on track to not run out of money through retirement
- \* Plan to transition wealth

## Frustrations / Pain points

- \* Technology is too consuming
- \* Personal data is sacred and wary of it being vulnerable online
- \* Tried calling in for help, but call taker could not see/tell what issue was
- \* Information required from online services - it's either too invasive or too uncertain

"Bliss will be our new hobby fixing up an antique car together with our 7 grandchildren when they visit"

## Skills

TECHNICAL



PERSONAL



BANKING



## Motivations

learn

solve

teach

career

family

savings

giving