Client Profiles Worksheet

**Demographics**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Client Profile 1 | Client Profile 2 | Client Profile 3 | Client Profile 4 |
| **Common goal** |  | | | |
| **Target** |  |  |  |  |
| **Life stage** |  |  |  |  |
| **Gender** |  |  |  |  |
| **Age range** |  |  |  |  |
| **Marital status** |  |  |  |  |
| **Location** |  |  |  |  |
| **Industry or employer** |  |  |  |  |
| **Education level** |  |  |  |  |
| **Career stage** |  |  |  |  |
| **Occupation** |  |  |  |  |
| **Family** |  |  |  |  |

**PSYCHOGRAPHICS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Client Profile 1 | Client Profile 2 | Client Profile 3 | Client Profile 4 |
| **Political affiliation** |  |  |  |  |
| **Hobbies** |  |  |  |  |
| **Personality** |  |  |  |  |
| **Financial motivation** |  |  |  |  |
| **Financial beliefs** |  |  |  |  |
| **Financial issues to solve** |  |  |  |  |
| **Attitude for investing** |  |  |  |  |
| **Religion** |  |  |  |  |

**FINANCIAL INFORMATION**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Client Profile 1 | Client Profile 2 | Client Profile 3 | Client Profile 4 |
| **Annual income** |  |  |  |  |
| **Investable assets** |  |  |  |  |
| **Net worth** |  |  |  |  |
| **Motivation for hiring you** |  |  |  |  |
| **Milestone events** |  |  |  |  |
| **Life goals** |  |  |  |  |