



## Persona List

### **Jon Smith (Grace)**

Jon got an entry-level job at a start-up technology company after he graduated with a master's degree in mechanical engineering. He became a father half a year ago, and since his wife needed to take care of the newborn, she quit her job. Jon was a tech enthusiast who deeply loved the latest electronic products. He never impulsively splurged despite his interest, prioritizing savings and meticulously planning each purchase. Outside work, his personality drew him to tech meetups and seminars, where he relished engaging with fellow tech lovers and sharing insights and experiences.

### **Blake (Norry)**

Blake is a detail-oriented software engineer with a keen interest in emerging technologies, particularly in artificial intelligence and fintech innovations. Having worked in the tech industry for over a decade, Blake possesses a solid understanding of the potential and risks associated with digital investments. Driven by a desire for financial independence and an early retirement, Blake is a long-term visionary who is always on the lookout for smart, sustainable investment strategies.

### **Amy (Ikra)**

Amy is a very-risk averse young person who is interested in investing after landing her first job. She's skeptical of the rise of AI and bots, and prefers to talk or email humans directly. Before making decisions, she likes to consult her family and friends to see what companies and products they use for investing. She trusts their advice as she is new to investing. Amy has talked to some family members who mentioned Vanguard may be one company she wants to check out.