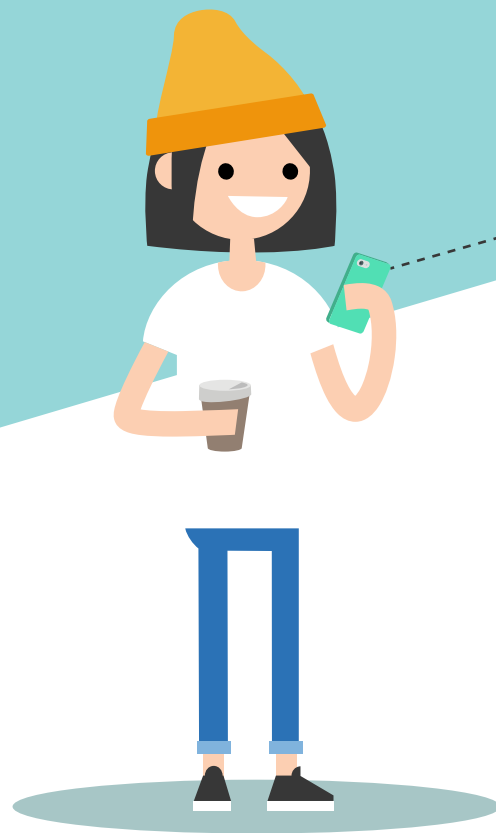


4 Types of Investors

The Trendsetter



RISK
89

Wants to be **first**
(Facebook, Netflix, IPOs)

More likely to go for the big reward
rather than the sure thing

Frequent portfolio changes
to keep up with the latest fad

Finds it **hard** to focus

What do they look for in an advisor?

The trendsetter needs a voice that encourages their adventurous investing but provides alternatives and balance. Don't stifle their spirit, find the ways to help them take advantage, but have the data available to show them what they stand to lose.

The Do-It-Yourselfer



RISK
70

Independent research **more likely** to
influence their opinions

Trusts their instincts and sees
gains or losses as theirs alone

More likely to go with
robo or **self-service** options

Willing to **take a risk** as long as it's **their idea**

What do they look for in an advisor?

An independently-minded investor needs an advisor that is willing to let them take the reins. The advisor should be hands off but also be a source of information and insight the investor needs when other research fails. They should also offer tools for self-monitoring such as client portals so that the do-it-yourselfer can stay informed.

The Numbers Guy



RISK
40

Won't make any decisions without **hard data**

Slow to trends and **does not** invest emotionally

Risk averse but will follow by example

Tech-savvy

What do they look for in an advisor?

The analytical investor seeks an advisor that values data just like they do. An advisor that is up-to-date with the latest client-facing technology constructs a data narrative the investor can't make themselves. The numbers guy seeks someone that brings numbers to life in a meaningful way.

The Scaredy-Cat



RISK
22

Cautious in all aspects of life, not just
investing

Frequent calls/emails with market **changes**

Buys **deliberately**, sells **emotionally**

More apt to trust **professional** advice

What do they look for in an advisor?

A scaredy-cat lives by the motto "safety first" and needs an advisor that makes them feel at ease. Stress tests, accurate projections, and portfolios that don't fluctuate much with market events are what they look for. An advisor that evokes confidence and has a record of sound advice will be a major asset for the cautious investor.

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