Buyer Persona: Prudent Planner Peter

Gender: Male
Age: 35
Location: Boston, MA
Relationship Status: Married with 1 child
Work: Software Engineer at a Tech Firm
Interests:
- Personal Finance
- Technology and Gadgets
- Reading Non-fiction Books
- Hiking and Outdoor Activities

Behaviors:
- Diligently saves and invests a portion of his income
- Reads financial blogs and listens to financial podcasts
- Often researches and compares financial tools online

Web History:
- Frequent visits to financial planning websites
- Reading reviews of financial advisors and tools
- Online forums discussions on retirement planning

Search Terms:
- “Best Financial Advisors in Boston”
- “How to plan for child’s education”
- “Tax-efficient investing strategies”

Pain Points:
- Difficulty in creating a long-term financial plan
- Concerns over college savings for his child
- Unsure about tax implications of his investments

Goals:
- Establish a solid financial plan for the future
- Ensure financial security for his family
- Grow wealth in a tax-efficient manner

How We can help?
- **Smith Financial** can offer personalized financial planning services, aligning with Peter's goals and current financial situation.
- Providing education on tax-advantageous investment strategies.
- Offering tools and resources for Peter to better understand and manage his finances, including planning for his child’s education.