

Define Your Ideal Client Profile

Use the worksheet below to create a description of your ideal client profile. If you have multiple client profiles, repeat this exercise for each profile. One ideal client profile is a business best practice, but as firms grow and expand, multiple client profiles may be appropriate.



MY IDEAL CLIENT

Use the space below to craft a short description of your ideal client profile.



PERSONAL (Age, Marital Status, Education,...)



INTERESTS, HOBBIES & PASSIONS



PERSONA (Personality, Relationship to Money, ...)



CHALLENGES, PAIN POINTS & FEARS



FINANCIAL (Income, Investable Assets, ...)



GOALS & DESIRED OUTCOMES



CAREER & PROFESSION



OTHER



WHY THEY WANT TO WORK WITH OUR FIRM

