

# Personas

## Anna

Age: 44

Location: Fresh Meadows, NY

**“Ivan’s early journey into financial literacy fills us with pride and relief, ensuring a bright future ahead.”**

Anna is a dedicated mother of two who is actively teaching her kids about money. She has set up savings accounts and college funds to secure their future and her approach emphasizes values and habit forming. Her kids are beginning to grasp the value of money but they’re not financially independent and Anna oversees their spending.

Anna is open to financial apps but hasn’t explored them much, Her knowledge about financial platforms for children is limited. While complex concepts aren’t discussed yet, Anna emphasizes distinguishing needs from wants, and understanding the importance of making thoughtful decisions.



### Goals

- Wants to ensure her kids have financial education tailored to their age
- Desires to oversee child’s spending until they are a certain age
- Seeks additional assistance in educating their children about financial concepts that she lacks confidence in

### Needs

- An age-appropriate financial education to ensure her kids learn important skills from a young age.
- To maintain control and oversight over her children’s spending and instill financial habits gradually
- External help to teach their children financial concepts

### Frustrations

- Struggles to find age-appropriate education resources for their children’s different developmental stages.
- Finds it challenging to balance between granting independence and maintaining financial control over childre
- Lacks confidence with certain financial concepts



Age: 7

## Ivan

Location: Fresh Meadows, NY

**“I like the game version of learning. I think having stickers, fun graphics, and goals is really fun.”**

Ivan is an energetic and curious 7-year old. Ivan’s journey into understanding money began with valuable lessons from his parents. He is learning that delayed gratification can lead to greater rewards in the future.

Ivan enjoys learning through games that are interactive and provide him with a sense of accomplishment. He knows that knowledge will empower him as he grows up and faces more complex decisions including financial ones. With the loving guidance of his parents, Ivan is determined to prepare himself for a bright future.

### Goals

- Wants to explore educational games that teach financial concepts in a fun and interactive way
- Aspires to develop a sense of independence by learning how to manage his own money
- Seeks more knowledge that will help him prepare for the future and supports him as he grows up

### Needs

- Access to engaging educational games that make learning about finances fun and interactive
- Requires guidance and resources to build financial independence gradually
- A tool that supports financial education catered to his age that will adjust as he grows up

### Frustrations

- Some educational games about financial concepts are dull and boring making learning less enjoyable
- Feels limited and dependent on parents financial decisions
- Struggles to grasp the intricacies of financial matters making it challenging to understand them