

## Ideal Investor Profile

1. Think about individuals you know that you would like to have as an investor - make a list of everyone you can think of.
2. Think about groups that you think your ideal investors could be part of - examples include your customers, vendors, neighbors, organizations of people that care about the problem your business solves, etc. - make a list of those groups - be as specific as possible when describing them, e.g. middle aged women who belong to the Sierra Club and are passionate about their and their families' health.
3. Now that you've pictured some possible ideal investors, picture the ones you would most like to have. They may fall into more than one group. For each group, picture an individual member of the group.
4. Make a list of three to five people that could be your ideal investor. They may be actual people or imaginary people. Give each imaginary person a name. Remember, even investors that are organizations are represented by individual people so go ahead and include representatives of organizational investors in your list if you like.
5. Write each person's name at the top of the pages below and write down everything you can think of about that person including what would make him/her an ideal investor. Be sure to include both demographics (like age and geographic location) and psychographics (personality characteristics). Here are some examples:

- totally gets what my business is about and supports me unconditionally
- very busy and would not be interested in getting involved in the day to day management of my business
- believe that all stakeholders and not just investors should benefit from the success of a business
- mid 40s
- married
- has kids
- educated - masters degree
- doesn't watch TV
- does a lot of volunteer work
- reads a lot
- uses facebook and pinterest
- kind and friendly
- passionate about \_\_\_\_\_
- had a difficult childhood and did a lot of personal growth work to deal with the challenges that caused
- introverted

6. Make a list of what you DON'T want in an investor. Here are some examples:

- very opinionated - thinks they are always right
- dishonest, not trustworthy
- does not communicate clearly

7. Create your Ideal Investor Profile(s)

Compile all the information from steps 5 and 6 and use the pages that follow to complete detailed profiles of one or more ideal investors. Be as specific as possible. If you're artistically inclined, you can draw them, create a collage that represents them, or choreograph a dance about them! The more clearly you can picture them, the easier it will be to hone in on the right people and not waste time on the wrong ones.



Ideal Investor Profile #2

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