

NAME

Charles Wong

TYPE

Rational

Type

Institutional Investor



Goals

- Understand risks and potential returns in investing in Hazelview.
- Find out who is behind Hazelview and how do they run.
- Ensure long-term investment sustainability.

Motivations

- Easily find details on the performance and trends on available products.
- Data-driven, historical information.
- Corporate responsibility.
- Seeking potential investment catalysts to boost his standing at the firm.

Frustrations

- Unable to find detailed information.
- Misleading data.
- Research that isn't substantiated.

Quote

“Lean on strategic and dynamic asset allocation to achieve the best return for my clients.”

Background

Charles is an Institutional Investor and has been steadily rising through the corporate ranks. He is meticulous in his research and calculating risks. Focused on reliable, long-term investment opportunities.

Brands and influencers



Traits

- Meticulous
- Risk averse

Demographic

♂ Male 43 years

📍 Canada

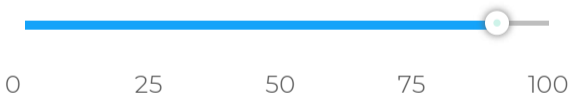
Investment Advisor

Skills

Investment Knowledge



Education



Technology/Web Browsing



Technology



Browsers

