

## BUDGETING & MONEY MANAGEMENT APPS

### Mint

www.mint.com

Free

**When you're on top of your money, life is good.  
We help you effortlessly manage your finances in one place.**

**Effortlessly stay on top of bills:** At last, your bills and money are together in one place and easier than ever to track. Just add your bills to see how helpful we can be.

- See bills and money in one place
- Get alerts about upcoming bills
- Say goodbye to late fees

**Personalized for you:**

- Create budgets that make sense today and set you up for success tomorrow
- See bills and money together, so you know what's due, when it's due and what you can pay
- Receive alerts for unusual account changes, and get custom tips for reducing fees and saving money
- Get you free credit score and learn how you can improve it now to get the things you want later

**Get started simply and securely:**

- It's easy to set up your free account in seconds, and help is available if you should ever need it
- We work to keep your information secure – all your data is encrypted
- Mint comes from the makers of TurboTax®, trusted by millions every year with their most sensitive data

**Multi-factor authentication and more:** We use strong security measures designed so only you can access your info. Rather than just a login and password, we also notify you of account changes with data from a second source or with information only you will have, like special security questions or a code from a text message or email.

**We safeguard the mobile app:** We safeguard Mint with your own 4-digit code so only you can view your account. You can also enable Touch ID if you choose. If your mobile device is ever lost or stolen, you can delete all your account information remotely.

**Intuitive features, powerful results**

Mint is versatile enough to help anyone's money make sense without much effort.  
There's no wrong way to use it, and nothing to lose getting started.  
You'll be surprised how life-changing something so simple can be.

**See what's fresh with Mint**

We've always got something cooking to help you master your money and improve your life.  
See the latest, and stay tuned for big things.

### Acorns

www.acorns.com

See website for plan pricing and features

#### **This Is Micro Investing**

Imagine if you could invest in your future without really noticing. Join over 3,000,000 people who know the feeling

#### **Sign Up in Under 5 Minutes**

Download Acorns and get started in no time, with no minimum investment required

#### **Invest Automatically**

Set aside spare change or extra cash automatically as you go about your day

#### **Stick With It**

Grow your account over time with diversified portfolios constructed by experts

#### **So Many Ways to Grow**

**Round-Ups** – Invest spare change from everyday purchases

**Recurring** – Set it and forget it with a daily, weekly or monthly automatic investment

**One-Time Investments** – Boost your account anytime, anywhere. Even \$5 adds up

**Found Money®** – Earn money when you shop with over 200 top brands

**Referrals** – Grow your account when your friends start investing

**Acorns Later** – The easiest way to save for retirement

#### **Invest Intelligently**

Every dollar you invest is automatically diversified across 7,000 stocks and bonds to help improve your return while reducing risk

#### **As easy as 1, 2, 3**

You've earned the right to pay a straightforward, predictable price to the people taking care of your money, so Acorns is \$1, \$2, or \$3 per month until you have \$1 million invested with us.

#### **Serious Security**

All of your data is protected with 256-bit encryption and never stored on your phone, tablet, or computer



*This is a sampling of the apps available to assist with budgeting and managing personal finance ~ All of the apps mentioned above are available for Android and iPhone.*

*Securities and Advisory Services offered through Crown Capital Securities, L.P., a Registered Broker/Dealer*

*Member FINRA/SIPC : OSJ Karen J Evans, CFP® ~ Partners: Karen J Evans, CFP® and Pamela J Zell, CFP®*

*14755 N Outer 40 Drive, Suite 204 ~ Chesterfield, MO 63017 ~ 636.519.0049 ~ www.sixpointgroup.com*

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### GoodBudget

www.goodbudget.com

Free

Plus Plan \$6/month (or \$50/year)

#### BUDGET SOFTWARE BUILT FOR DAILY LIFE

Over the years, we've seen GoodBudget and EEBA, the Easy Envelope Budget Aid, help thousands of people stick to a budget.

You'll save for big expenses, share budgets with the people who matter most—with cloud sync-enabled apps—and create a budget that actually works.

With the foundation of the time-tested envelope budgeting system, the GoodBudget app for Android and iPhone is chock full of powerful features without compromising simplicity.

#### ON THE GO. ALWAYS UP-TO-DATE.

##### BUDGETING THAT WORKS

- Based on the envelope budgeting method – a time-tested system that works!

##### SYNC & SHARE BUDGETS

- Put your budget into action with the people who matter most.

##### SAVE FOR BIG EXPENSES

- Plan ahead and be prepared.
- No more surprises!

#### YOUR FINANCIAL LIFE TRANSFORMED

The way we handle money reflects and shapes our character, values, relationships, emotions, and habits. Put simply, money is more than dollars and cents.

- **BUDGET WITH A WHY**

- Spend on what's important.
  - (Create a budget to help)
- Decide what's enough.
- Save for big expenses.

- **LIVE OUT YOUR BUDGET**

- Say goodbye to guilt.
- Adapt along the way.
- Stick with it.

- **TALK WITH PEOPLE YOU TRUST**

- Move past the taboo
- See your blind spots
- Deepen your relationships

- **GIVE GENEROUSLY**

- Give money and more.
- Practice gratitude.
- Experience freedom.

### Mvelopes

www.mvelopes.com

30-Day Free Trial for Basic and Plus Plans

#### Don't just track your spending ~ FIX IT

##### Get Smart with Your Money

Whether you just need the **Mvelopes App** to stay on top of your spending, want to expand your knowledge with the **Learning Center**, or could use a **Personal Finance Trainer**, we've got a solution for you.

#### Our Approach ~ 4 Steps to Financial Freedom

- **Give your money a Purpose:** If you don't control your money, it will begin to control you. Don't wander aimlessly through your financial life; decide where to go and use your money in a way that moves you in that direction. Giving your money a purpose empowers you to spend it on what really matters to you.
- **Avoid Debt:** Debt brings so much negative baggage that most of us agree it's best just to avoid it whenever possible. Mvelopes is designed to help you eliminate debt and live so that you won't have to worry about more debt in the future.
- **Simplify:** Staying on track with finances is hard work. We'd all rather be doing something besides managing our money; so plans and tools that help us with that should be as simple as possible. By simplifying the way you think about and use money, you decrease your stress so that you can focus on what really matters to you.
- **Plan for Tomorrow:** We help you plan for all the expenses that you can anticipate and prepare for those that you can't. Grow your available cash, because being prepared for tomorrow leads to less worries today. It means no longer living paycheck-to-paycheck, but earning money this month and saving it to cover future expenses.

- **BASIC (\$4/month or \$40/year):**

- Connect Unlimited Accounts
- On The Go – use Mvelopes wherever you are
- Real Time Budgeting
- A Plan for Every Dollar – stop wondering where it all went

- **PLUS (\$19/month or \$190/year) also includes:**

- Knowledge is Power – interactive tools to help you
- Jump Start
- Tackle Your Debt
- Expert Guidance – quarterly feedback from a Personal Finance Trainer

- **COMPLETE (\$59/month or \$549/year) also includes:**

- One-on-One Personal Finance Trainer – monthly sessions
- Plan to Succeed
- Track Your Wins – with financial goal tracking
- Full Access, Total Control

**Gain Confidence, Sleep Better and Find Relief from Financial Worries**



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