

The screenshot shows the ZenFinance dashboard. On the left, a sidebar includes links for Overview, Income, Expenses, Savings, Debt, Wishlist, ZenAI, Profile, and Sign Out. A 'HEALTH SCORE' section displays a score of 84 with a +6.3% change. The main area features a large red box for 'TOTAL CAPITAL' showing \$2,800,000.00, a 'Month-over-Month' growth of 6.3%, and a '+ Add' button. To the right is an 'Asset Allocation' chart with three segments: Income (pink), Savings (teal), and Investments (purple). Below it is a 'Recent Activity' section with a 'VIEW ALL TRANSACTIONS' link and a 'Recent Activity' button. At the top right, there's a user profile for 'Adan' with a notification bell icon.

what does notifications button do ?  
nothing happens with click

different currencies balance., with +add if needed  
see wise below



**Wishlist**

**Wishlist**  
Prioritize your dreams and goals

**+ Add Goal**

**New Financial Goal**

GOAL NAME	TOTAL COST (\$)	CURRENT SAVINGS (\$)
suede loafers	2,000.00	500.00

**TARGET DATE**

dd/mm/yyyy

**dropdown or option  
for currency  
GBP / IDR  
(or just global currencies  
as in, list all maybe)**

**i changed my profile pic in  
account but seems to be spazzin'**

**auto pull from savings.  
or should this be balance?  
how come this box is here**

**Cancel** **Add to List**

The screenshot shows a mobile application for managing financial goals. At the top, there's a header 'Wishlist' and a user profile 'Adan'. A pink button '+ Add Goal' is visible. Below, a section for a 'New Financial Goal' is shown with fields for 'GOAL NAME' ('suede loafers'), 'TOTAL COST (\$)' ('2,000.00'), and 'CURRENT SAVINGS (\$)' ('500.00'). A 'TARGET DATE' field shows 'dd/mm/yyyy' with a calendar icon. Red annotations provide feedback: one points to the 'CURRENT SAVINGS (\$)' field with the text 'dropdown or option for currency GBP / IDR (or just global currencies as in, list all maybe)'; another points to the same field with 'auto pull from savings. or should this be balance? how come this box is here'; a third points to the user profile with 'i changed my profile pic in account but seems to be spazzin''. A 'Cancel' button and a pink 'Add to List' button are at the bottom.



## Income Sources

Managing your cash flow sources

**+ Add Income**

### New Income Stream

SOURCE NAME

e.g. Primary Salary

CATEGORY

Salary

MONTHLY AMOUNT

\$0.00

FREQUENCY

Monthly

dropdown for currency here too

for salary, the 'monthly amount' makes sense, but when change to freelance, it still says it

Cancel

**Save Source**

also if monthly, needs a box to say which day of month . this will help robot to help me plan based on dates and priority too

The screenshot shows the ZenFinance mobile application interface. On the left is a navigation sidebar with icons for Overview, Income (which is selected), Expenses, Savings, Debt, Wishlist, ZenAI, Profile, and Sign Out. Below these is a Health Score card showing a score of 84 and a green progress bar. The main content area is titled "Income" and "Income Sources: Managing your cash flow sources". It displays two income sources: "moo branding part 2" (Freelance, One-time, Monthly Flow: \$1,400,000) and "Persona" (Salary, Monthly, Monthly Flow: \$1,400,000). At the top right, there are buttons for "Add Income" and a user profile for "Adan". A red annotation with a black arrow points to the top right corner of the screen, containing the text: "add a totals box somewhere, with as many as needed, in my case i will have added only GBP or IDR, so there would be (maybe at the top somewhere next to title, can see totals of what's lined up here. these will pull from income sources)". Another red annotation with a black arrow points to the "Persona" entry, containing the text: "make the categorys diff colours for easy differentiation at a glance".

ZenFinance

Income

Income Sources  
Managing your cash flow sources

IDR 24,000,000 GBP 1,000 + Add Income

moo branding part 2  
FREELANCE • ONE-TIME  
MONTHLY FLOW \$1,400,000

Persona  
SALARY • MONTHLY  
MONTHLY FLOW \$1,400,000

Health Score: 84 +6.3%

Adan

add a totals box somewhere, with as many as needed, in my case i will have added only GBP or IDR, so there would be (maybe at the top somewhere next to title, can see totals of what's lined up here. these will pull from income sources)

make the categorys diff colours for easy differentiation at a glance

The screenshot shows the ZenFinance mobile application interface. On the left is a sidebar with icons for Overview, Income, Expenses (selected), Savings, Debt, Wishlist, ZenAI, Profile, and Sign Out. The main area is titled "Outgoings" and "Expenses". It displays a "Log Transaction" form with fields for MERCHANT / BUSINESS (e.g. Apple Inc.), AMOUNT (0.00), and CATEGORY (Housing). A pink "Add Transaction" button is at the bottom right of the form. Below the form is a list of transactions: "bike" under UTILITIES on 2020-02-26 with a monthly amount of -\$100.00, and "rent" under HOUSING on 2020-02-26 with a monthly amount of -\$500.00. At the top right of the main screen are a bell icon and a profile picture for "Adan".

design/make icons for these  
diff colours as well for each category

filter by category and or date?

dropdown currency

need a dropdown to say whether it's monthly or one off. if it's monthly a box needs to appear with a dropdown or something for which day of the month, so it will start to know what i've got 'coming up', then that will inform where it advises me to put dough based on priority of dates

The screenshot shows the ZenFinance mobile application interface. The top navigation bar includes the ZenFinance logo, a bell icon, and a user profile for "Adan". The left sidebar menu has the following items: Overview, Income, Expenses, **Savings** (which is selected and highlighted in dark blue), Debt, Wishlist, ZenAI, Profile, and Sign Out. A "HEALTH SCORE" indicator at the bottom left shows 84 with a green progress bar. The main content area is titled "Savings" and "Savings & Wealth: Building your future capital". It features a large central box displaying "TOTAL ACCUMULATED \$0.00" and a "Financial freedom goal in progress" message. To the right is a decorative background image of a piggy bank. A teal button labeled "+ Add Account" is located in the top right corner of the main content area. A modal window titled "New Asset Account" is open in the center, prompting for "ACCOUNT NAME" (e.g. Rainy Day Fund), "CURRENT BALANCE" (0.00), and "CATEGORY" (Emergency Fund). Buttons for "Cancel" and "Open Account" are at the bottom of the modal.

this page need to see my GBP savings and also my IDR savings. somehow need it to understand that i have two accounts so if like 20jt comes in, 2jt goes into the indo savings. for now just need 1 'savings' account rather than diff types. as anything saving for specifically will be in wishlist. this will just be literally one (or in this case two) savings pots for general squirrelage.

**ZenFinance**

**Debt**

**Debt Management**  
Strategically reducing liabilities

**+ Add Liability**

**TOTAL OUTSTANDING**  
**\$0.00**

**Avg Rate** 0%    **Monthly Min** \$0

**Wishlist**

**ZenAI**

**Profile**

**Sign Out**

**Debt-Free Zone**  
You've cleared all your liabilities

**mikey**    400    18.9  
50.00    Low Priority

**what is min payment?**

**same here re currencies, as i owe a couple mates in IDR, and a couple in GBP, for example.**

**then needs to have those totals in both at a glance**

# Debt Management

Strategically reducing liabilities

+ Add Liability

TOTAL OUTSTANDING

**\$200.00**

% AVE RATE  
0.0%

MONTHLY MIN  
\$0

mikey

MEDIUM

0% APR

FEB 10

BALANCE  
**\$200**  
Min Payment: \$0

\$ 200

Pay



is there a way that it can all pull info from each page,  
for example: i allocate and pay mikey 200, this gets removed from  
my balance on overview page, so later i know what i have got to play ,  
without having to manually update the balance

## “THIS MONTH AT A GLANCE”

### Asset Allocation



maybe the at-a-glance list is:

- incoming
- expenses
- savings
- available

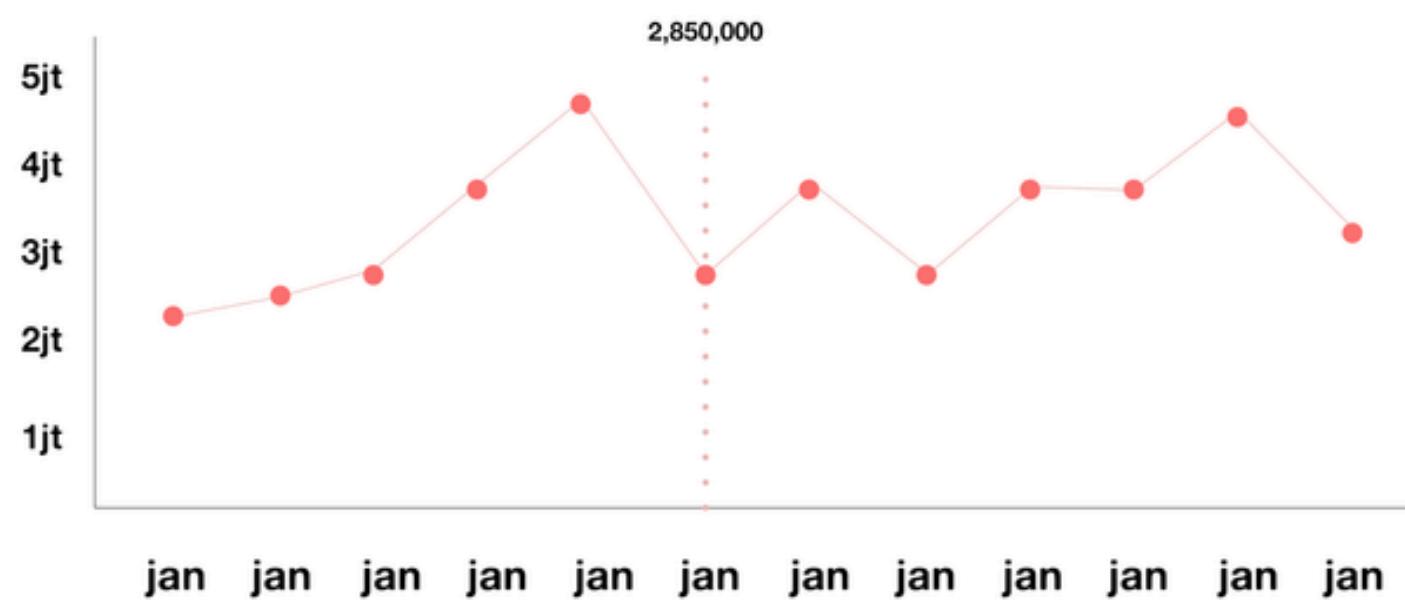
maybe this can be a top line glance at the current month

incoming (pulling data from everything lined up in incoming)

outgoing (based on expenses, not wishlist, i guess?)

need some kind of place where i can see allocation for ‘fun’ or basically money that has no goal, free money, liquid money, whatever u wanna call it ?

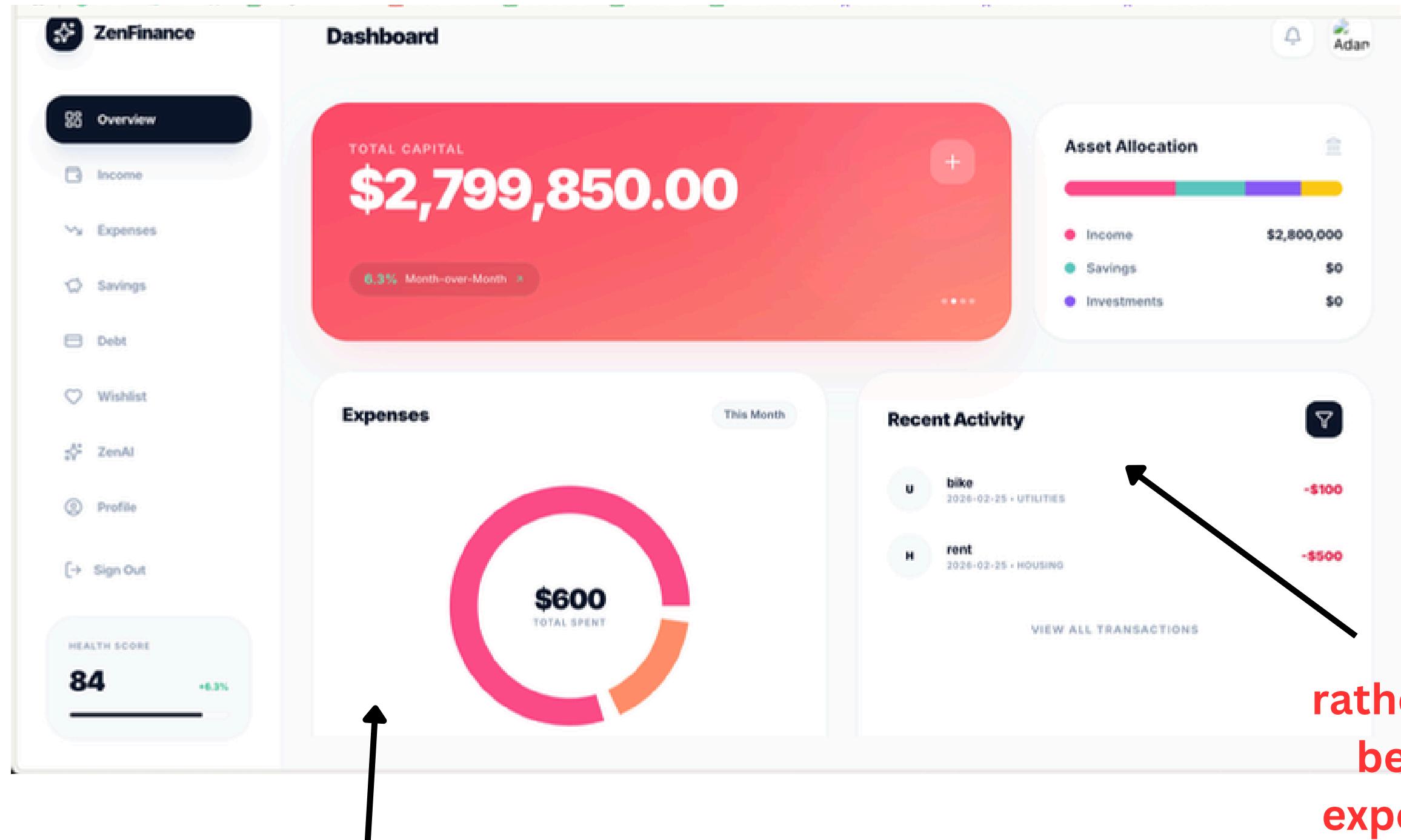
## **monthly income for 2026**



be cool to see a month on month thing like this so i can see how much i earned/came in, to see it (hopefully rise)

maybe one line colour for GBP and another line colour on same graph for IDR

it would pull from whatever currencies are set up by the user. if i had a third balance in my home dash, it would also be here.



the ins and outs top line could be here maybe, in some way that displays easily if more is coming in than out, or vice versa.

maybe ther does need to be a place to log my spending, just top like, like ‘food’ etc... so that over time it can advise based on that... “you’re spending a lot on coffee mate, maybe you can fuck off the coffee for the next month in order to make sure you have the X you need for XYZ coming up next month” . sort of thing. ultimately looking for this thing to be literally my financial advisor so the more data i can give it the better!

rather than transactions here, might be more useful to see upcoming expenses, so i can see, for example, ‘next up is rent’, etc . these could be pulling from the dates programmed for the monthly