

Tab 1

SURVEY QUESTIONS

Q1. Do you currently use a money management or spending tracker app?

- a) Yes → Jump to Q2 If YES (they use an app)
- b) No → Jump to Q4 If NO

If Yes

3. (If yes)Which budgeting app do you currently use?

- a) Mint
- b) YNAB
- c) EveryDollar
- d) Excel/Google Sheets
- e) Other (please specify)

3. (if yes) What is one feature you wish your current money tool had?

(please specify)

If NO

4. (If no)How do you currently keep track of your spending, Manually (notebook/Excel)

- a) Excel/Google Sheets
- b) I don't track spending

5. (If no)What's the biggest reason you don't use a money tool right now?

- a) Too complicated
- b) Don't trust linking bank accounts
- c) Prefer manual methods
- d) Haven't found one that fits my needs
- e) Other (please specify)

6. What would make you try a money management app? (Open-ended) (please specify)

SURVEY QUESTIONS

For everyone

7. How often do you check your finances/budget?

- a) Daily
- b) Weekly
- c) Monthly
- d) Rarely/Never

8. On a scale of 1–10, how confident do you feel about managing your money?

1 2 3 4 5 6 7 8 9 10

9. What is your biggest challenge with budgeting? (Select all that apply)

- a) Sticking to a budget
- b) Tracking expenses in real time
- c) Overspending on wants vs. needs
- d) Managing debt payments
- e) Saving consistently
- f) Other (please specify)

10. Have you used a budgeting app before? If yes, what did you dislike or find frustrating about it? (Open-ended)

11. What financial goals are most important to you?

- a) Paying off debt faster
- b) Saving for emergencies
- c) Saving for a big purchase (car, house, trip)

SURVEY QUESTIONS

- d) Building wealth / investing
- e) Sticking to a monthly budget

12. How motivated are you to achieve your financial goals right now?

- a) Very motivated
- b) Somewhat motivated
- c) Not very motivated

13. Which features would be most useful in a budgeting app? (Rank or choose top 3)

- i) Automated expense tracking
- ii) Debt payoff calculator
- iii) Savings challenges / gamified features
- iv) Bill reminders & alerts
- v) Financial goal setting & progress tracking

14. Would you like the app to connect directly to your bank accounts, or would you prefer manual entry?

- a) Manual daily entry
- b) Automatic syncing
- c) Both

15. How important is visual design (charts, dashboards, reports) when it comes to budgeting apps?

- a) Very important
- b) Somewhat important
- c) Not important

16. Would you be willing to pay for a budgeting app that helps you save money or pay off debt faster?



SURVEY QUESTIONS

- a) Yes – monthly subscription, if yes what are you willing to pay
- b) Yes – one-time payment, if yes what are you willing to pay
- c) No – I prefer free tools

17. What would make you trust a budgeting app enough to use it daily? (Open-ended) (please specify)

18. If you could design your ideal budgeting app, what's one feature it must have? (Open-ended) (please specify)

 Thank You Screen

“Thank you for sharing your thoughts! Your feedback is incredibly valuable and will directly help us create a tool that fits your needs. Stay tuned — we can’t wait to show you what’s next  ”

Tab 2

Q1. Do you currently use a money management or spending tracker app?

Yes → Jump to Q2

No → Jump to Q4

If YES

Q2. Which app do you currently use?

Mint

YNAB

EveryDollar

Excel/Google Sheets

Other

Q3. What is one feature you wish your current money tool had?

(Open-ended) → Jump to Q6

If NO

Q4. What's the biggest reason you don't use a money tool right now?

Too complicated

Don't trust linking bank accounts

Prefer manual methods

Haven't found one that fits my needs

Other

Q5. What would make you try a money management app?

(Open-ended) → Jump to Q6

Section 3 – For Everyone

Q6. What money goals are most important to you?

Paying off debt faster

Saving for emergencies

Saving for a big purchase (car, house, trip)

Growing wealth / investing

Staying on track with monthly spending

Q7. How motivated are you to achieve your money goals right now?

Very motivated

Somewhat motivated

Not very motivated

Q8. If you could design your ideal money app, what's one feature it must have?

(Open-ended)



Thank You Screen

"We hate to see you go, but your input is very insightful — thank you! Stay tuned 🙏"

Your feedback will help us design a tool that truly works for you."