M MoneyMind

Book an Advisor

Your journey to financial wellness starts here

All-in-one financial wellness platform that quantifies your financial health, delivers personalized, actionable recommendations, and client-advisor match making.

Your Financial Wellness Score

Track your progress across the four pillars of financial wellness and see how you're doing overall.

Overall Financial Wellness

Your aggregated score across all pillars

Take Control · Prepare for Unexpected · Goals Progress · Long-Term Security

Very Good

Last updated: 11/04/2025

Pillar Breakdown

Your score in each financial wellness area

Take Control of Finances	Excellent	88/100
Prepare for the Unexpected	Excellent	83/100
Make Progress Toward Goals	Fair	57/100
Long-Term Security	Good	69/100

Take Control of Finances

88 Excellent

This score measures how well you manage your money day-to-day, including budgeting, spending habits, and saving rate.

Improvement tip:
You're doing great! Continue maintaining your spending habits and savings rate.

Prepare for the Unexpected

83 Excellent

This score evaluates your readiness for financial emergencies and unexpected expenses through emergency funds and insurance.

Improvement tip:
Your emergency preparedness is excellent! Maintain your emergency fund and consider adequate insurance.

Progress Toward Goals

57 Fair

This score tracks how well you're progressing toward your defined financial goals, such as saving for a home or education.

Improvement tip:
Set specific financial goals with clear timelines and create a plan to achieve them.

Long-Term Security

69 Good

This score assesses your readiness for retirement and long-term financial stability through investments and retirement planning.

Improvement tip:
Review your retirement strategy to ensure you're on track for your desired retirement age.

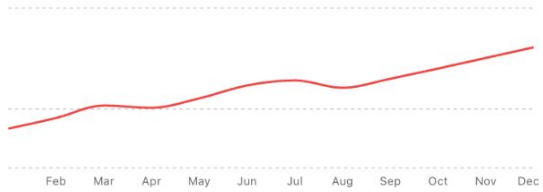
Financial Dashboard

Track your progress, get personalized recommendations, and reach your financial goals faster.

Portfolio Balance

Total Balance $153,200

+7.3% YTD +$10,700

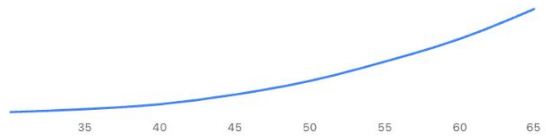


Retirement Tracker

On Track for Age 65 5%

35 years old → 65 years old

Current: $85,000 Target: $1,850,000



Investment Allocation

Stocks	57%	Bonds	23%
Cash	8%	Real Estate	12%

Budget Tracking

Monthly Income	$5,200
Total Expenses	$3,380
Monthly Savings	$1,820

Emergency Fund

Current Fund	$10,520
Monthly Expenses	$3,300
Months Covered	3.2 months

Net Worth

$128,220 +5.8% this month

Total Assets	$156,720
Total Liabilities	$28,500

Investment Portfolio

Total Portfolio	$145,200
401(k)	$82,450
IRA	$42,300
Taxable	$20,450

Debt Management

Total Debt	$28,500
Credit Card	$3,200
Student Loans	$18,300
Car Loan	$7,000

Savings Goals

Home Down Payment	$18,500 / $60,000
Vacation	$2,800 / $5,000
New Car	$8,200 / $15,000

Financial Milestones

Celebrate your financial achievements with playful emoji reactions as you reach your milestones.

Milestone Achievements

Click the buttons below to trigger milestone celebrations

Goal Created	Goal Milestone
Goal Completed	Emergency Fund
Budget Streak	First Investment
Retirement Increase	Debt Reduction
Credit Score	Expense Reduced
Income Increased	

Auto-demo mode: Stop Demo

Recent Achievements

…tones and achievements

Retirement Contribution Increased to 18%!

- …ased to 18%! — 11/04/2025, 15:05:05 — retirement increase
- Goal Completed: New Car Fund achieved! — 11/04/2025, 15:05:11 — goal completed
- Credit Score Improved by 35 points! — 11/04/2025, 15:05:11 — credit score improved
- Goal Milestone: 50% of the way to Home Down Payment! — 11/04/2025, 15:05:10 — goal milestone

Total achievements: 51

Quantifiable Return for Client

Measurable results that demonstrate the value of MoneyMind's financial wellness platform

43%

Percentage improvement in financial wellness upon accepting recommendations

3.1x

Increase in engagement when improving financial wellness

$19,772

Average projected dollar return upon accepting MoneyMind recommendations

Financial Tools & Resources

Empower your financial journey with professional tools to help you optimize your financial wellness.

Portfolio Optimization

Analyze fees, asset allocation, and get rebalancing suggestions.

Cash Flow Analysis

Track spending patterns and optimize your monthly budget.

Account Aggregation

Connect all your financial accounts for a complete picture.

Retirement Simulator

Project your retirement readiness with adjustable variables.

Real-time Alerts

Get notified about important financial changes and opportunities.

Situational Advisor Session

Book a session with a Certified Financial Planner.

Common Financial Questions

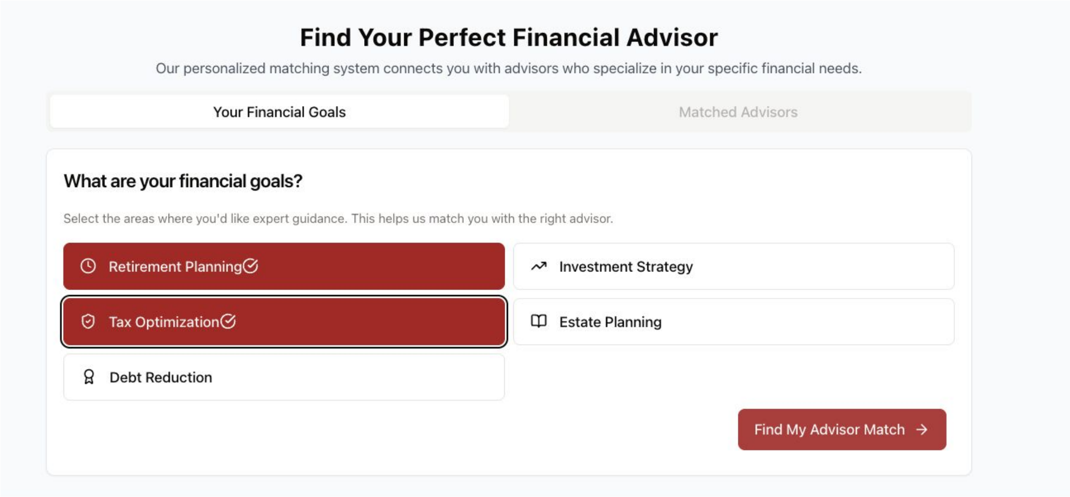
The questions that keep you up at night - we're here to help you answer them

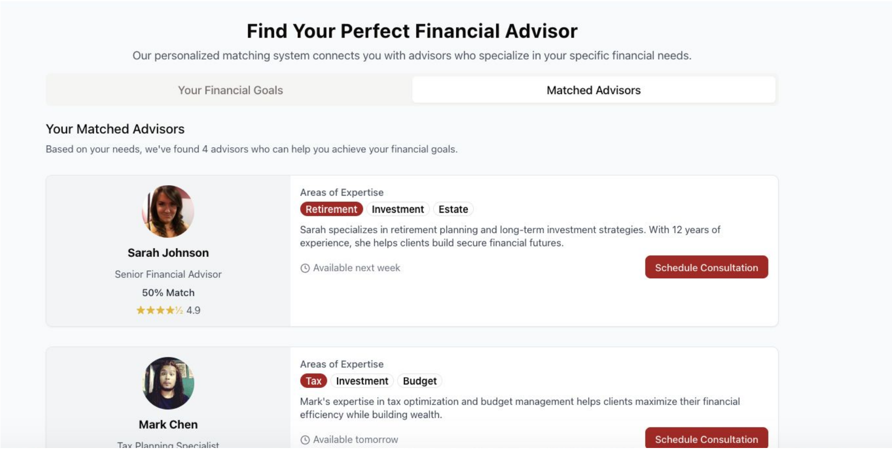
? Am I hitting my savings goals?

Our financial advisors are ready to answer all your questions

Financial wellness begins with understanding. Our platform helps you answer important questions about saving, budgeting, retirement planning, and more.

Connect with an Advisor


Find Your Perfect Financial Advisor
Our personalized matching system connects you with advisors who specialize in your specific financial needs.
Your Financial Goals
Matched Advisors
What are your financial goals?
Select the areas where you'd like expert guidance. This helps us match you with the right advisor.
Retirement Planning
Investment Strategy
Tax Optimization
Estate Planning
Debt Reduction
Find My Advisor Match


Find Your Perfect Financial Advisor
Our personalized matching system connects you with advisors who specialize in your specific financial needs.
Your Financial Goals
Matched Advisors
Your Matched Advisors
Based on your needs, we've found 4 advisors who can help you achieve your financial goals.
Areas of Expertise
Retirement
Investment
Estate
Sarah specializes in retirement planning and long-term investment strategies. With 12 years of experience, she helps clients build secure financial futures.
Available next week
Schedule Consultation
Sarah Johnson
Senior Financial Advisor
50% Match
4.9
Areas of Expertise
Tax
Investment
Budget
Mark's expertise in tax optimization and budget management helps clients maximize their financial efficiency while building wealth.
Available tomorrow
Schedule Consultation
Mark Chen
Tax Planning Specialist

Book a Situational Advisor Session

Schedule a personalized session with a financial advisor to discuss your goals and create a tailored plan.

Choose Your Appointment Type

Appointment Type

- (●) Virtual Meeting (30 minutes)
- ( ) In-Person Meeting (60 minutes)
- ( ) Phone Consultation (15 minutes)

Select an Advisor

Select an advisor

Select a Date

Pick a date

Select a Time

Select a date to see available times

Your Name

Email Address

Phone Number (Optional)

Confirm Booking

Financial Wellness Resources

Explore our library of resources to improve your financial knowledge and wellbeing.

Retirement Planning Guide

Guide

A comprehensive 25-page guide with step-by-step instructions on creating a sustainable retirement plan that supports your lifestyle goals. Includes worksheets and calculators.

Read More →

Debt Management Strategies

Guide

This 18-page guide covers effective approaches to manage and eliminate debt. Features case studies, repayment strategies, and a debt snowball calculator template.

Read More →

Emergency Fund Essentials

Guide

A practical 12-page guide on building and maintaining your emergency savings. Includes a savings rate calculator and strategies for different income levels.

Read More →

Resource Summaries

Text Summary

Our comprehensive written guides provide in-depth information and actionable advice on financial topics. Each guide includes worksheets, calculators, and step-by-step instructions you can follow at your own pace.

- Detailed explanations of complex financial concepts
- Printable worksheets and templates
- Self-guided exercises and assessment tools
- Reference materials for future planning

Video Summary

Our video library features expert-led tutorials and visual explanations of key financial concepts. Visual learners will benefit from animated graphics and step-by-step demonstrations.

- Engaging visual explanations of complex topics
- Expert interviews and real-world examples
- Screen-sharing tutorials for online tools
- Accessible format for visual learners

Audio Summary

Our audio resources are perfect for learning on the go. Listen during your commute or while exercising to make the most of your time while improving your financial knowledge.

- Expert interviews and discussions
- Weekly market updates and analysis
- Guided tutorials for financial planning
- Perfect for learning during commutes

Browse All Resources

Live Chat with MoneyMind AI Agent

Get personalized financial guidance and answers to all your questions

Elevate your financial wellness knowledge with personalised AI answers.

- 24/7 availability
- Instant answers to financial questions
- Financial advice explainability

Start Live Chat

Ask me anything

Online

Hello! How can I help you today?

Type your message...

Ready to transform your financial future?

Join thousands of clients who've achieved their financial goals with MoneyMind.

Get in Touch

Have a question or need assistance? Fill out the form and a financial advisor will get back to you within 24 hours.

support@moneymind.vanguard.com

1-800-MONEY-MIND (1-800-666-3964)

100 Vanguard Boulevard
Malvern, PA 19355

Full Name

John Doe

Email Address

john.doe@example.com

Phone Number (Optional)

(123) 456-7890

Topic

Retirement Planning

Message

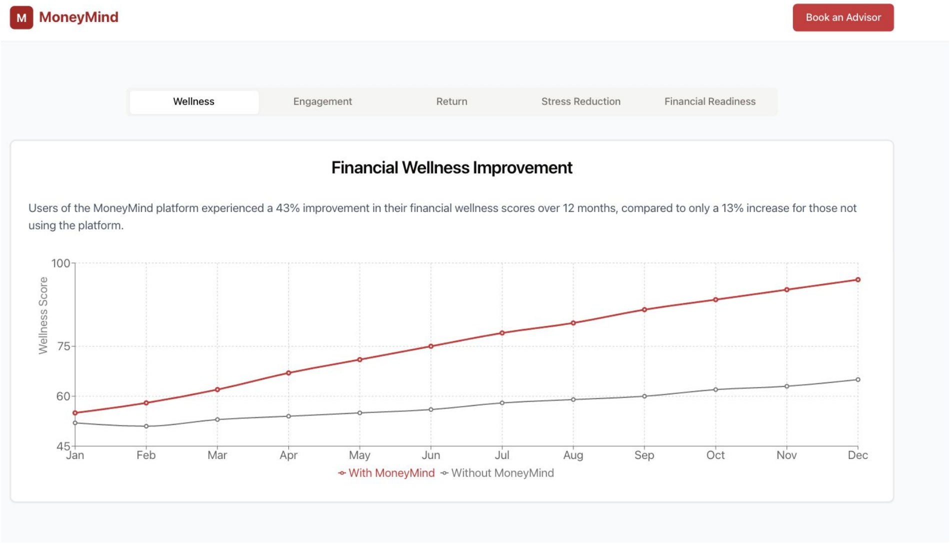
How can we help you?

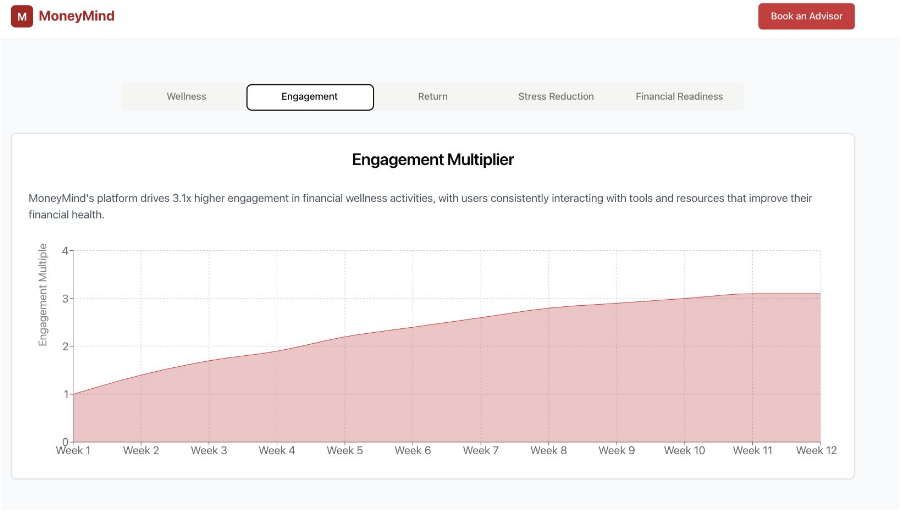
Send Message

Business Impact for Vanguard

View detailed metrics and analysis on the business impact of MoneyMind

View Business Impact





Wellness | Engagement | Return | **Stress Reduction** | Financial Readiness

Financial Stress Reduction

MoneyMind users experience a 60% reduction in financial stress over 12 months, compared to only a 12% reduction for those not using the platform.

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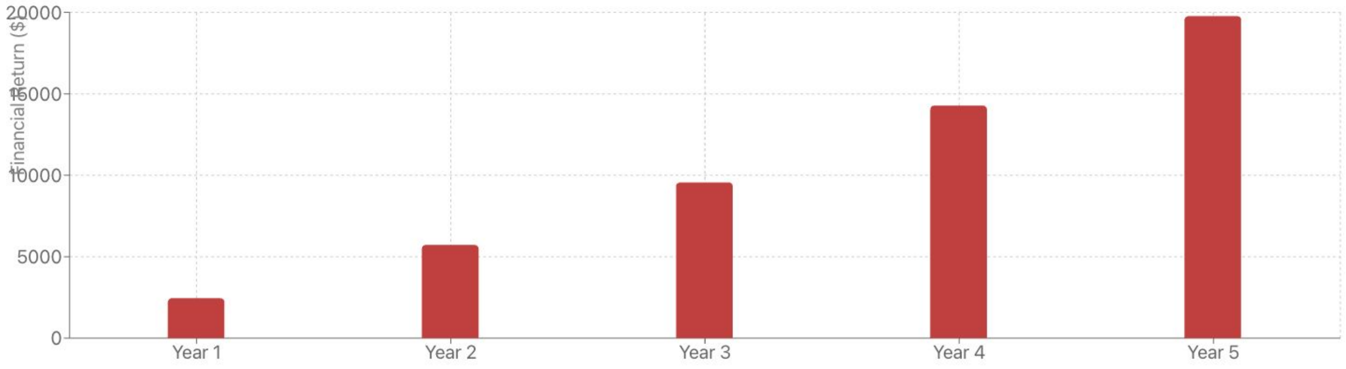
Wellness | Engagement | Return | Stress Reduction | Financial Readiness

Financial Returns

Users who accept MoneyMind's financial recommendations achieve an average of $19,772 in additional value over 5 years through improved savings, debt reduction, and investment returns.



Wellness | Engagement | Return | Stress Reduction | **Financial Readiness**

Financial Readiness Improvement

MoneyMind users see dramatic improvements in key financial readiness metrics over time, including emergency funds, retirement savings, debt management, and overall savings rate.

Emergency Fund	Retirement	Debt Management	Savings Rate
+240%	**+150%**	**+85%**	**+250%**
Over 2 years	Over 2 years	Over 2 years	Over 2 years

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Your complete financial wellness solution by Vanguard.