CHECKLIST · FINANCIAL MANAGEMENT

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Evaluating Financial Apps



Using the right financial apps can simplify budgeting, saving, and investing. Use this checklist to evaluate and choose apps that meet your needs.

10 steps · Print-ready A4

NAME _____ START _____ TARGET DATE _____

1 Identify Your Financial Goals

Decide what you want the app to help with: budgeting, saving, investing, or tracking expenses.

EXAMPLE *"I need an app to track my monthly spending."*

2 Research Popular Apps

Look for highly rated options like Mint, YNAB, or Acorns.

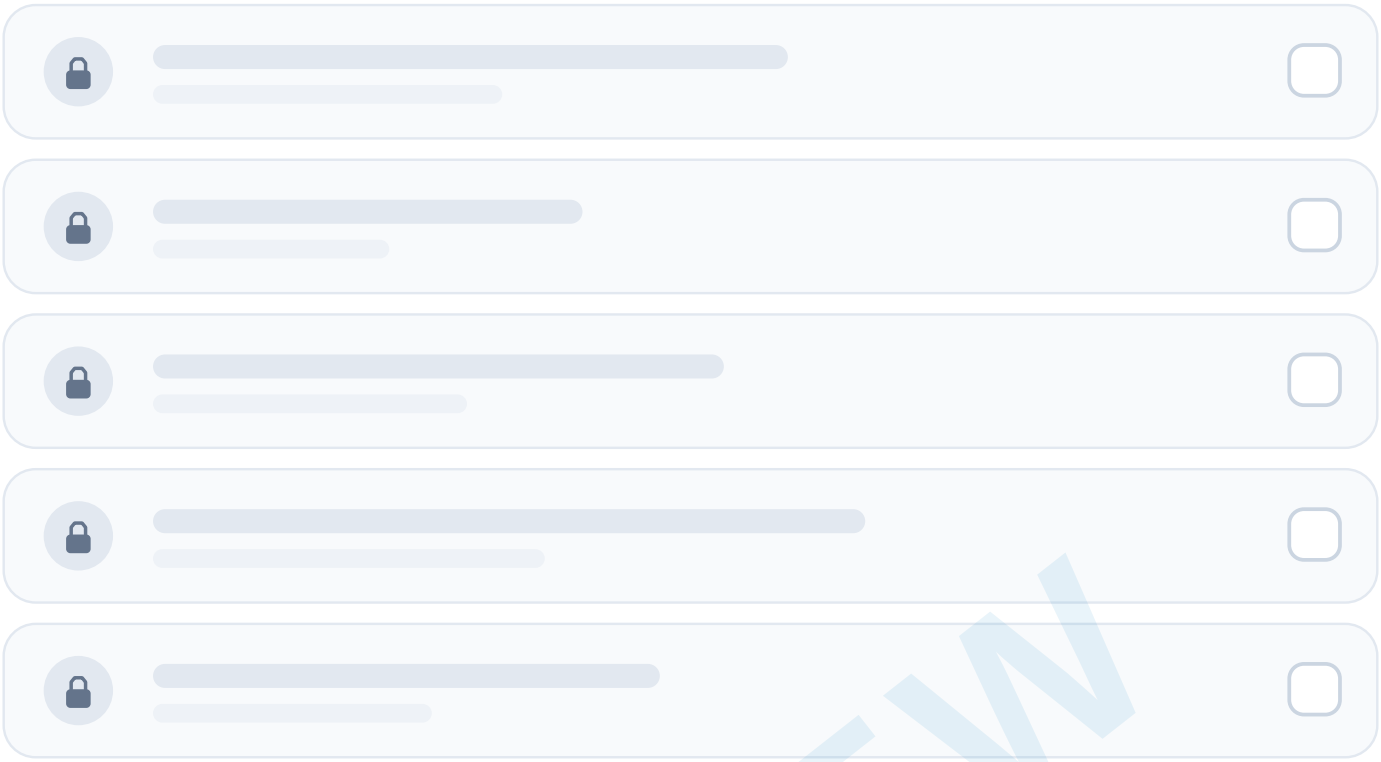
TIP *Focus on apps recommended for your specific financial needs, such as investing apps like Robinhood or savings apps like Qapital.*

3 Check Features

Review each app's capabilities to ensure they match your needs.

EXAMPLE *Does the app support syncing with multiple bank accounts?*

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