

currence

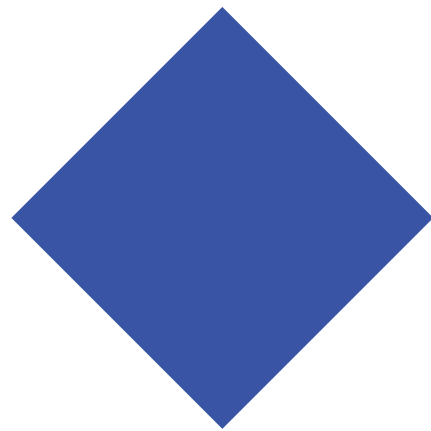
livecurrence.com





Money Movements

Inflows



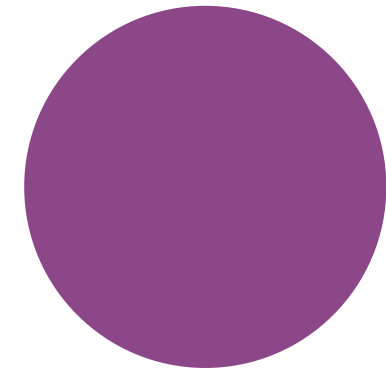
Any form of new money entering your world. Inflows can be from earned sources, passive sources, or from unscheduled sources.

Outflows



Any form of money permanently leaving your world. Outflows are considered funds needed for fixed, variable, and discretionary expenses.

Capital Flows



Any form of money staying within your world. Capital Flows are movements between your assets, for instance moving money from your savings account to an investment account.

PENSIONS BONUS
 SALARY BUSINESS ROYALTIES
 INVESTMENTS
 TRUSTS INTEREST
 DIVIDENDS

MORTGAGE
 FIXED EXPENSES
 VARIABLE RENT
 DISCRETIONARY VACATION
 EXPENSES

◆ Inventory of Income Sources

Your Name:

Partner/Spouse:

1.	_____	_____	1.	_____
Source	Frequency	Amount		
2.	_____	_____	2.	_____
3.	_____	_____	3.	_____
4.	_____	_____	4.	_____
5.	_____	_____	5.	_____
6.	_____	_____	6.	_____

Total: _____

■ Inventory of Spending Accounts

Your Name:

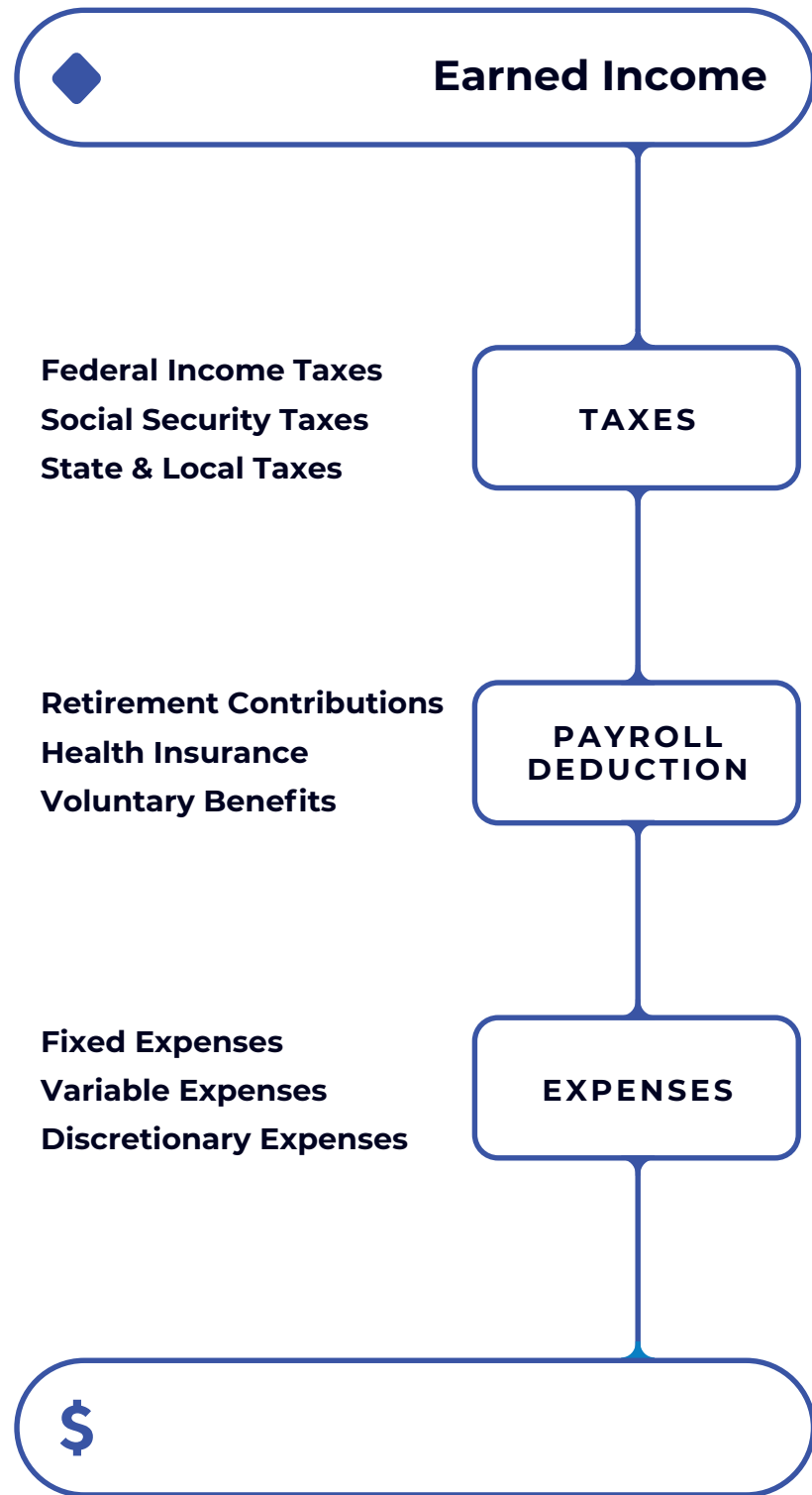
Partner/Spouse:

1.	_____	1.	_____
Account	Average Monthly Spending		
2.	_____	2.	_____
3.	_____	3.	_____
4.	_____	4.	_____
5.	_____	5.	_____
6.	_____	6.	_____

Total: _____

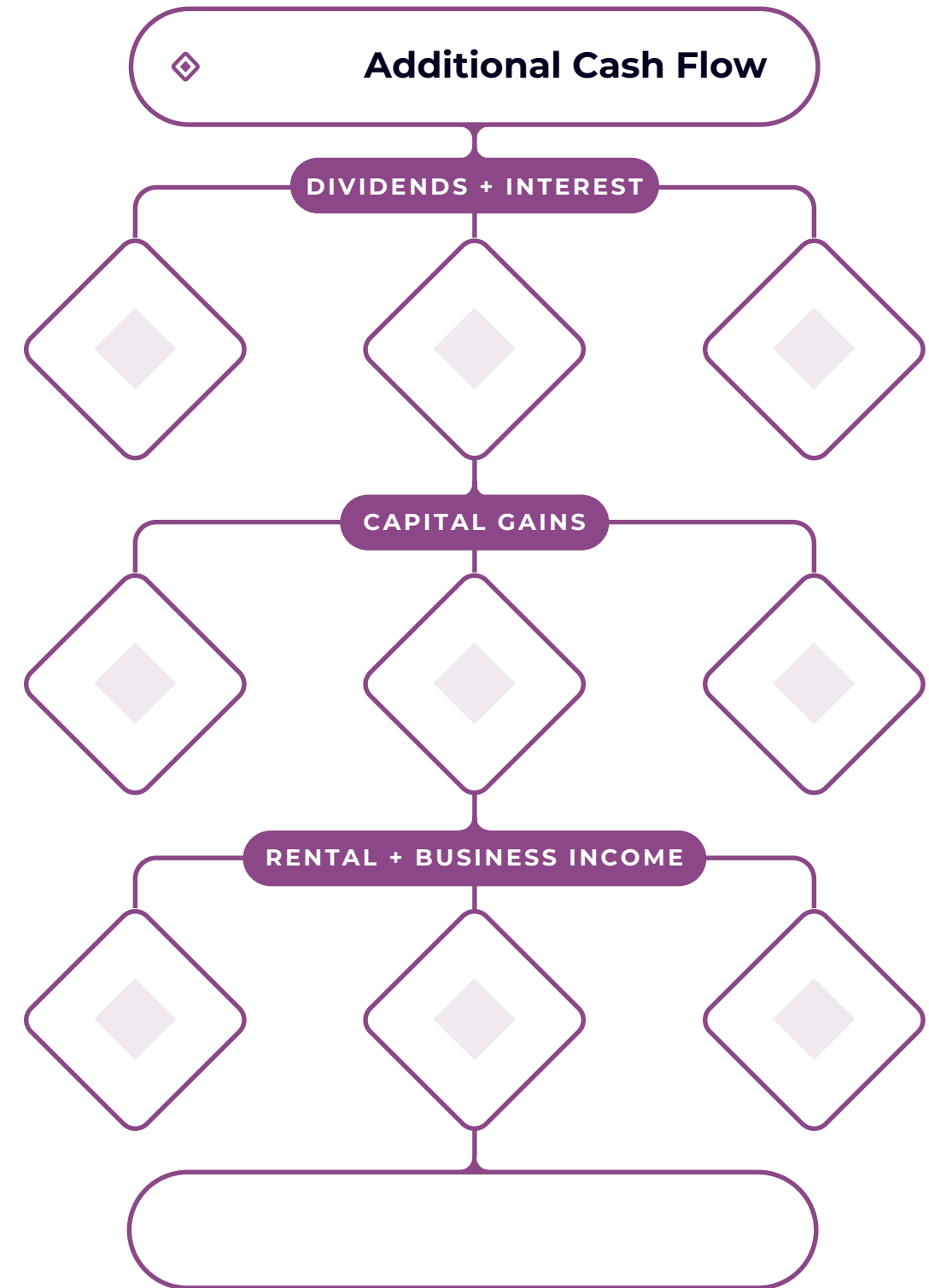


Financial Gravity



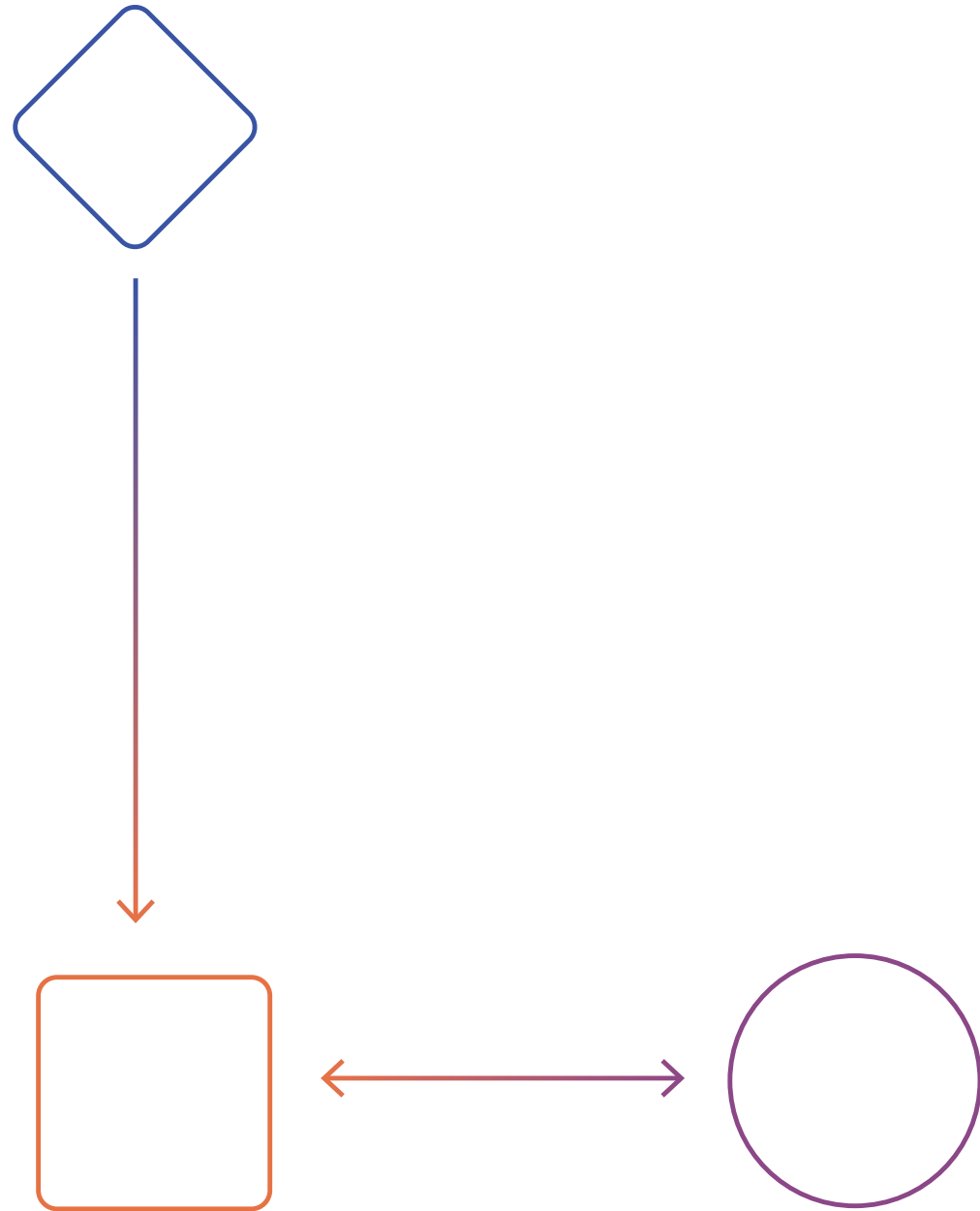
Savings Rate _____ %

Cash Flow Engines

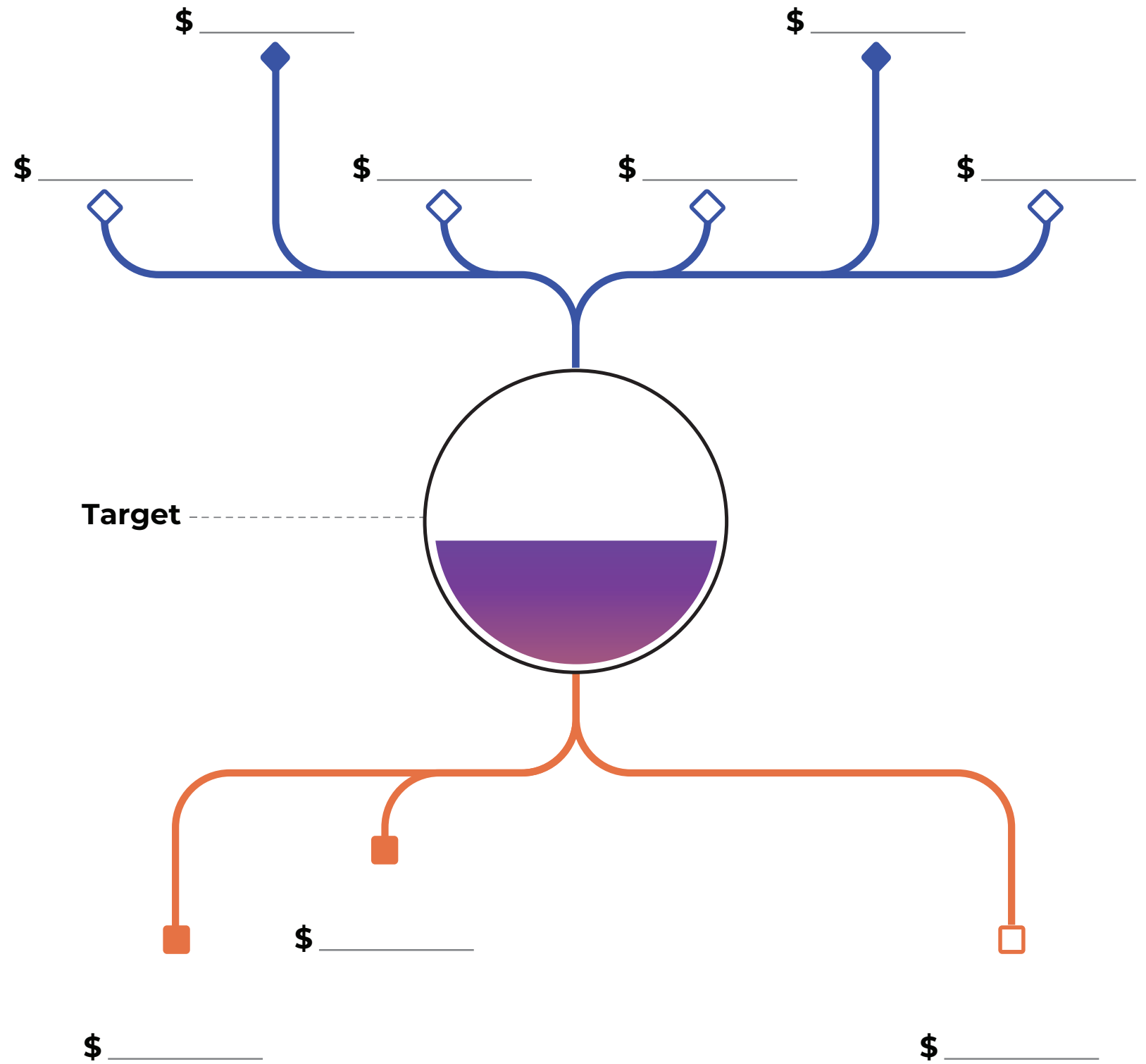




The Treadmill

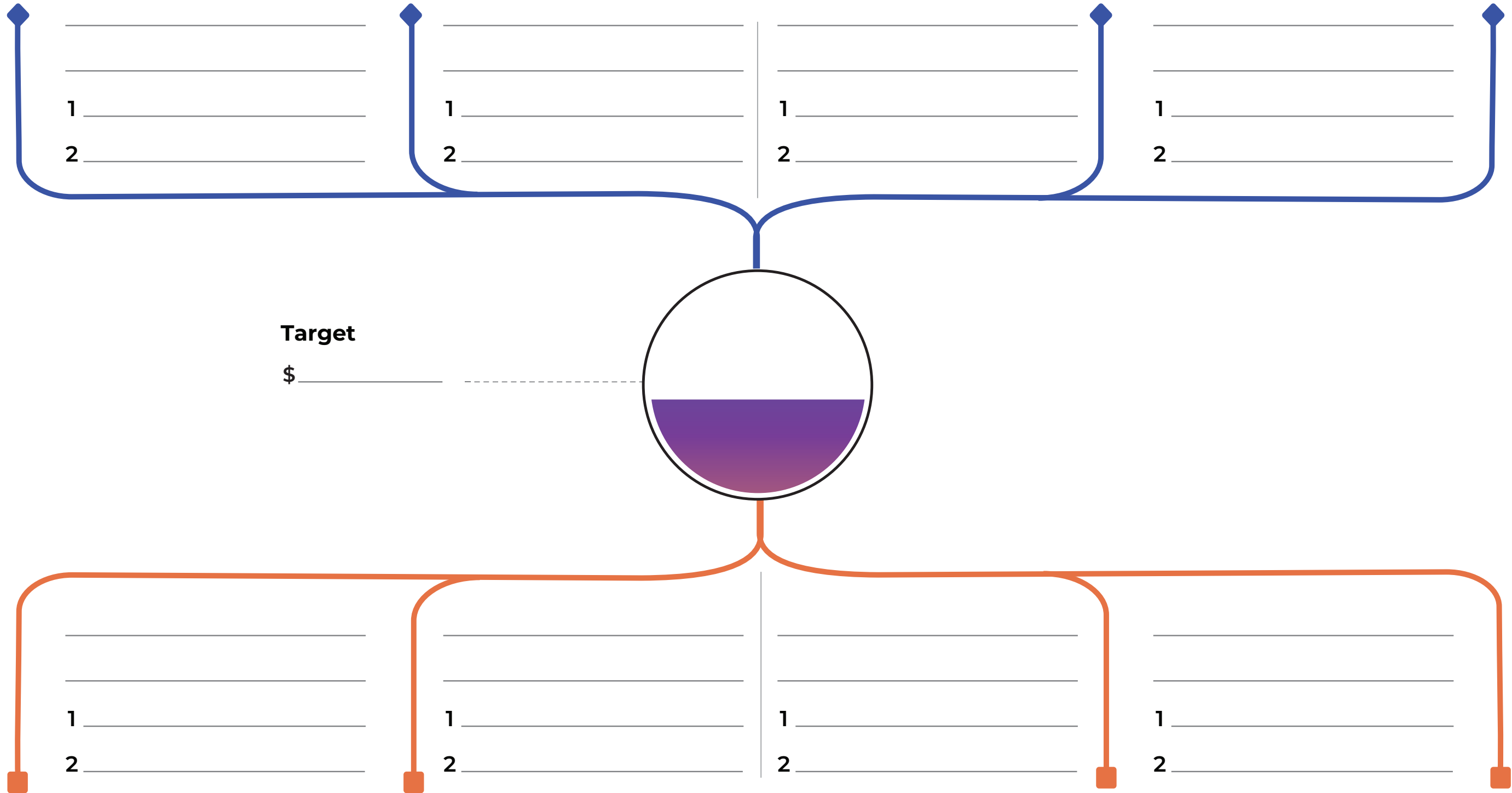


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My Cash Flow Structure





To Do List

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

7 _____

8 _____

9 _____

10 _____

Notes



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Currence reroutes how you spend and save, to create a more connected—and efficient—cash flow system, helping you achieve financial freedom faster.

Your Reservoir Balance
\$84,869.72

Cash Flow Health See more
 You are averaging +\$2,000 in monthly net cash flow.

Target Balance See more
 Your balance is \$34,870 above your target.

Recent Activity View all

- Transfer to Checking Account - \$8,000.00
June 20, 2024
- DIRECT DEPOSIT + \$10,000.00
June 15, 2024

HOME CONNECT CONTROL PANEL INSIGHTS

Ralph Edwards
 Currence Strategist

Call Email Schedule

Introduce a Friend →

Connect with Currence

Support Feedback

Refer a Friend

HOME CONNECT CONTROL PANEL INSIGHTS

Control Panel

Move Money New Deposit

My Cash Flow Structure
 Your structure for managing monthly spending and accumulating savings →

Money Movements
 View recent movements of money and initiate one-time money movements →

Remote Deposit
 Deposit your checks right from your phone →

Linked Accounts
 Nickname linked accounts and manage their connections →

HOME CONNECT CONTROL PANEL INSIGHTS

Insights

Cash Flow Breakdown

10K
5K
0

FEB MAR APR

Inflow Baseline Deviations

Tap months to see detail.

Net Cash Flow History

- 30 days +\$2,000
- 6 months +\$8,978
- 1 year +\$27,011
- Lifetime +\$68,996

HOME CONNECT CONTROL PANEL INSIGHTS