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## About Monarch

Monarch is an all-in-one personal finance app on a mission to make better financial outcomes available to everyone. The award winning personal finance app allows members to distill their complex financial life into one clear view, collaborate with a partner or advisor, and plan for the future. Monarch is \$14.99 per month or \$99.99 per year and available on web, iOS, Android. For more information, please visit [www.monarchmoney.com](http://www.monarchmoney.com).

## Mission + Vision

Val Agostino, Monarch's CEO and co-founder, was one of the original product managers at Mint and grew their user base from 0 to millions. When he founded Monarch in 2019 with Ozzie Osman and Jon Sutherland, they wanted to build a far more intuitive and powerful personal finance app that put the users' needs first to truly help them improve their financial situations. Instead of selling ads or customers' financial data, Monarch charges a subscription fee so that the team can focus on building the best possible user experience, with constant improvements based on user feedback.

## Product Overview

For a more in-depth explanation of individual features, [check out our website](#).

- **Get a complete view of all your finances, alongside your partner**
  - Sync all accounts and investments into one view, simplifying your otherwise fragmented and complex financial life. Track your net worth, cash flow and spend by category over time. Search for transactions across any account.
- **Collaborate on finances with your partner or financial professional.**
  - Create a shared view of your finances with a partner for tension-free collaboration, whether you have joint accounts or keep things separate. You can also invite your financial coach, advisor or tax professional to your account so they can provide helpful guidance with zero data collection needed from you.
- **Use budgets and goals to track your progress and plan for the future**
  - Create custom budgets and track your spending. Set financial goals, like saving for a vacation or a house, and track your progress. Get automatic notifications so you always know how you're tracking.
- **Gain insights on your spending, so you can find ways to save**
  - Track your spending by category or merchant, see trends over time and get an easy visual of your cash flow with the fan favorite Sankey report. View recurring transactions and cancel unwanted subscriptions.

Why customers choose Monarch over other personal finance apps:

- **Simple, intuitive design**
- Securely **collaborate with your partner** using separate logins
- Fully **customize everything**: budget, notifications, layout, rules, tags, categorization, etc
- **No ads**, and **no selling data** to third parties
- The team **incorporates customer feedback** into frequent product updates
- Best-in-class **syncing and connectivity**, using multiple aggregators to cover 13k+ account and investment types