

# EXPENSIFY, INC. Reported by BARRETT DAVID MICHAEL

## FORM 4

(Statement of Changes in Beneficial Ownership)

## Filed 11/20/24 for the Period Ending 11/20/24

Address	401 SW 5TH AVENUE
	PORTLAND, OR, 97204
Telephone	(520) 271-0858
CIK	0001476840
Symbol	EXFY
SIC Code	7372 - Services-Prepackaged Software
Industry	Software
Sector	Technology
Fiscal Year	12/31

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☐ Check this box if no longer subject to Section 16. Form 4 or Form 5 obligations may continue. *See* Instruction 1(b).

☐ Check this box to indicate that a transaction was made pursuant to a contract, instruction or written plan that is intended to satisfy the affirmative defense conditions of Rule 10b5-1(c). See Instruction 10. OMB APPROVAL OMB Number: 3235-0287 Estimated average burden hours per response... 0.5

## UNITED STATES SECURITIES AND EXCHANGE COMMISSION Washington, D.C. 20549

## STATEMENT OF CHANGES IN BENEFICIAL OWNERSHIP OF SECURITIES

Filed pursuant to Section 16(a) of the Securities Exchange Act of 1934 or Section 30(h) of the Investment Company Act of 1940

1. Name and Address of Reporting Person <sup>*</sup>	2. Issuer Name and Ticker or Trading Symbol	5. Relationship of Reporting Person(s) to Issuer				
		(Check all applicable)				
Barrett David Michael	Expensify, Inc. [ EXFY ]					
(Last) (First) (Middle)	3. Date of Earliest Transaction (MM/DD/YYYY)	X_Director10% Owner				
	, , , , , , , , , , , , , , , , , , , ,	_X_ Officer (give title below) Other (specify below)				
C/O EXPENSIFY, INC., 401 SW 5TH	11/20/2024	Chief Executive Officer				
AVE						
(Street)	4. If Amendment, Date Original Filed (MM/DD/YYYY)	6. Individual or Joint/Group Filing (Check Applicable Line)				
PORTLAND, OR 97204		X Form filed by One Reporting Person Form filed by More than One Reporting Person				
(City) (State) (Zip)		Form filed by More than One Reporting Person				
Table I - Non	-Derivative Securities Acquired, Disposed of, or Ben	eficially Owned				

I Iton Dei	I all to beet	11 10105 1 100	1	cu, Disp	oseu o	i, or <i>D</i> e	including of theu		
2. Trans. Date	2A. Deemed	3. Trans. Code		4. Securities Acquired (A)			5. Amount of Securities Beneficially Owned	6.	7. Nature
	Execution	(Instr. 8)		or Disposed of (D)			Following Reported Transaction(s)	Ownership	of Indirect
	Date, if any			(Instr. 3, 4 and 5)			(Instr. 3 and 4)	Form:	Beneficial
									Ownership
								or Indirect	(Instr. 4)
								(I) (Instr.	
		Code	V	Amount	(D)	Price		4)	
11/20/2024		~(1)		15 454	D	(2)	2 250 210		See
11/20/2024		S		15,454	D	\$2.91	2,378,319	1	note (3)
							177,451	D	
		2. Trans. Date 2A. Deemed Execution Date, if any	2. Trans. Date 2A. Deemed Execution Date, if any Code	2. Trans. Date 2A. Deemed Execution Date, if any Code V	2. Trans. Date 2A. Deemed Execution Date, if any Code V Amount Code V Amount	2. Trans. Date 2A. Deemed Execution Date, if any 2. Code V Amount (A) or (D) (A) or (D) (A) or (D) (A) or (	2. Trans. Date 2A. Deemed Execution Date, if any 2. Code V Amount (A) or (D) Price	$\begin{array}{c c c c c c c c c c c c c c c c c c c $	2. Trans. Date 2A. Deemed 3. Trans. Code 4. Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5) 5. Amount of Securities Beneficially Owned 6. Ownership Form: Direct (D) or Indirect (I) (Instr. 3 and 4)   11/20/2024 S <sup>(1)</sup> 15,454 D \$2.91 <sup>(2)</sup> 2,378,319 I

#### Table II - Derivative Securities Beneficially Owned (e.g., puts, calls, warrants, options, convertible securities)

2.	3. Trans.	3A. Deemed												11. Nature
Conversion	Date	Execution	(Instr. 8)		Derivative Securities		and Expiration Date		Date Securities Underlying		Derivative	derivative	Ownership	of Indirect
or Exercise		Date, if any			Acquired (A) or		-		Deriv	ative Security	Security	Securities	Form of	Beneficial
Price of		-			Disposed of (D)				(Instr.	. 3 and 4)	(Instr. 5)	Beneficially	Derivative	Ownership
Derivative					(Instr. 3, 4 and 5)					-		Owned	Security:	(Instr. 4)
Security												Following	Direct (D)	
-												Reported	or Indirect	
							Date	Expiration	Title	Amount or Number of		Transaction(s)	(I) (Instr.	
			Code	V	(A)	(D)	Exercisable	Date	THE	Shares		(Instr. 4)	4)	
	or Exercise Price of Derivative	Conversion Date or Exercise Price of Derivative	Conversion Date Execution or Exercise Date, if any Price of Derivative	Conversion Date Execution (Instr. 8) or Exercise Date, if any Price of Derivative Security	Conversion Date Execution (Instr. 8) Price of Derivative Security	Conversion or Exercise Price of Derivative Security	Conversion or Exercise Price of Derivative Security	Conversion or Exercise Price of Derivative Security Date Execution Date, if any (Instr. 8) Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5) and Expiration	Conversion or Exercise Price of Derivative Security Date Execution Date, if any (Instr. 8) Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5) and Expiration Date	Conversion or Exercise Price of Derivative Security Date Execution Date, if any (Instr. 8) Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5) and Expiration Date Secur Derivative (Instr. 8)	Conversion or Exercise Price of Derivative Security Date, if any (Instr. 8) Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5) and Expiration Date Securities Underlying Derivative Security (Instr. 3 and 4)   Security Date Date Date Date Date Date   Image: Derivative Security Date Date Date Date Date Date   Image: Derivative Security Date	Conversion or Exercise Price of Berivative SecurityDateExecution Date, if any(Instr. 8)Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5)and Expiration Date Berivative Security (Instr. 3 and 4)Derivative Security (Instr. 5)	Conversion or Exercise Price of Berivative SecurityDate, if any(Instr. 8)Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5)and Expiration Date and Expiration DateSecurities Underlying Derivative Security (Instr. 3 and 4)Derivative Security (Instr. 3 and 4)Derivative Security (Instr. 5)Derivative Security Beneficially Owned Following Benefacially	Conversion or Exercise Price of Derivative SecurityDate, if any(Instr. 8)Derivative Securities Acquired (A) or Disposed of (D) (Instr. 3, 4 and 5)and Expiration Date and Expiration DateSecurities Underlying Derivative Security (Instr. 3 and 4)Derivative SecurityDerivative SecurityDerivative SecurityDerivative SecurityOwnership Form of Derivative Security

### **Explanation of Responses:**

- (1) The transactions reported on this Form 4 were effected pursuant to a Rule 10b5-1 trading plan adopted by the reporting person on August 15, 2024.
- (2) The price reported in Column 4 is a weighted average price. These shares were sold in multiple transactions at prices ranging from \$2.83 to \$2.96, inclusive. The reporting person undertakes to provide to Expensify, Inc., any security holder of Expensify, Inc., or the staff of the Securities and Exchange Commission, upon request, full information regarding the number of shares sold at each separate price within the ranges set forth in this footnote.
- (3) By Barrett Trust LLC, a manager-managed limited liability company. The investment and voting decisions of Barrett Trust LLC are made by its manager, the Reporting Person, and its controlling member is the Barrett Family Trust, for which the Reporting Person serves as trustee.

#### **Reporting Owners**

Penarting Owner Name / Address	Relationships						
Reporting Owner Name / Address	Director	10% Owner	Officer	Other			
Barrett David Michael C/O EXPENSIFY, INC. 401 SW 5TH AVE PORTLAND, OR 97204	x		Chief Executive Officer				

/s/ Ryan Schaffer, as attorney-in-fact	11/20/2024
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\*\*Signature of Reporting Person

Date

Reminder: Report on a separate line for each class of securities beneficially owned directly or indirectly.

\* If the form is filed by more than one reporting person, see Instruction 4(b)(v).

\*\* Intentional misstatements or omissions of facts constitute Federal Criminal Violations. See 18 U.S.C. 1001 and 15 U.S.C. 78ff(a).

Note: File three copies of this Form, one of which must be manually signed. If space is insufficient, see Instruction 6 for procedure.

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