## SEC Form 4

## FORM 4

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

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

STATEMENT OF CHANGES IN BENEFICIAL OWNERSHIP

OMB APPROVAL

OMB Number:	3235-0287							
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Instruction 1(b)	).		Filed pursuant to Section 16(a) of the Securities Exchange Act of 193					
			or Section 30(h) of the Investment Company Act of 1940					
1. Name and Address of Reporting Person <sup>*</sup> Barrett David Michael			2. Issuer Name <b>and</b> Ticker or Trading Symbol <u>Expensify, Inc.</u> [EXFY]		ationship of F k all applicab	Reporting Person(s) to Issuer ble)		
Ballen Davi	<u>iu michael</u>			1	Director		10% Owner	
(Last)	(First)	(Middle)	3. Date of Earliest Transaction (Month/Day/Year) 08/07/2024	~	Officer (giv below)	ve title	Other (specify below)	
C/O EXPENSI	IFY, INC.	. ,	08/07/2024		Chief	Executive (	Officer	
401 SW 5TH A	AVE		4. If Amendment, Date of Original Filed (Month/Day/Year)	6. Indi Line)	ividual or Joir	t/Group Filing	(Check Applicable	
(Street)				1	Form filed	by One Repo	rting Person	
PORTLAND	OR	97204			Form filed Person	by More than	One Reporting	
(City)	(State)	(Zip)	Rule 10b5-1(c) Transaction Indication	-				
			Check this box to indicate that a transaction was made pursuant satisfy the affirmative defense conditions of Rule 10b5-1(c). See	to a cont	ract, instruction n 10.	ı or written plan	that is intended to	

### Table I - Non-Derivative Securities Acquired, Disposed of, or Beneficially Owned

1. Title of Security (Instr. 3)	2. Transaction Date (Month/Day/Year)	2A. Deemed Execution Date, if any (Month/Day/Year)	3. Transa Code ( 8)					5. Amount of Securities Beneficially Owned Following Reported	6. Ownership Form: Direct (D) or Indirect (I) (Instr. 4)	7. Nature of Indirect Beneficial Ownership (Instr. 4)	
			Code	v	Amount	(A) or (D)	Price	Transaction(s) (Instr. 3 and 4)		(1150.4)	
Class A Common Stock	08/07/2024		S <sup>(1)</sup>		16,260	D	<b>\$1.52</b> <sup>(2)</sup>	3,264,870	Ι	See note <sup>(3)</sup>	
Class A Common Stock	08/08/2024		<b>S</b> <sup>(1)</sup>		16,165	D	<b>\$</b> 1.53 <sup>(4)</sup>	3,248,705	Ι	See note <sup>(3)</sup>	
Class A Common Stock	08/09/2024		S <sup>(1)</sup>		12,801	D	<b>\$1.98</b> <sup>(5)</sup>	3,235,904	Ι	See note <sup>(3)</sup>	
Class A Common Stock								218,680	D		

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

			( 0,1	•	•			• •				•			
1. Title of Derivative Security (Instr. 3)	2. Conversion or Exercise Price of Derivative Security	3. Transaction Date (Month/Day/Year)	3A. Deemed Execution Date, if any (Month/Day/Year)	4. Transa Code ( 8)	(Instr.	of Deriv Secu Acqu (A) o Dispe of (D	erivative ecurities cquired s) or isposed f (D) nstr. 3, 4		Deriv	int of rities rlying ative rity (Instr.	8. Price of Derivative Security (Instr. 5)	9. Number of derivative Securities Beneficially Owned Following Reported Transaction(s) (Instr. 4)	10. Ownership Form: Direct (D) or Indirect (I) (Instr. 4)	11. Nature of Indirect Beneficial Ownership (Instr. 4)	
				Code	v	(A)	(D)	Date Exercisable	Expiration Date	Title	Amount or Number of Shares				

#### **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 December 15, 2023.

2. The price reported in Column 4 is a weighted average price. These shares were sold in multiple transactions at prices ranging from \$1.51 to \$1.53, 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.

4. The price reported in Column 4 is a weighted average price. These shares were sold in multiple transactions at prices ranging from \$1.51 to \$1.54, 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.

5. The price reported in Column 4 is a weighted average price. These shares were sold in multiple transactions at prices ranging from \$1.75 to \$2.17, 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.

Remarks:

/s/ Ryan Schaffer, as attorney-08/09/2024

in-fact

\*\* Signature of Reporting Person Date

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

 $^{\ast}$  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.

Persons who respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB Number.