# **Securities and Exchange Commission** Washington, D.C. 20549

## Schedule 13G

(Rule 13d-102)

Information to be Included in Statements Filed Pursuant to § 240.13d-1(b), (c) and (d) and Amendments Thereto Filed Pursuant to § 240.13d-2

#### **UNDER THE SECURITIES EXCHANGE ACT OF 1934**

(Amendment No. 3)\*

# Expensify, Inc.

Class A Common Stock, par value \$0.0001 (Title of Class of Securities)

30219Q106 (CUSIP Number)

September 30, 2024 (Date of Event Which Requires Filing of this Statement)

Check the appropriate box to designate the rule pursuant to which this Schedule is filed:				
	Rule 13d-1(b)			
	Rule 13d-1(c)			
$\boxtimes$	Rule 13d-1(d)			

The remainder of this cover page shall be filled out for a reporting person's initial filing on this form with respect to the subject class of securities, and for any subsequent amendment containing information which would alter the disclosures provided in a prior cover page.

the information required in the f 1934 ("Act") or otherwise sultotes).	remainder of this cover poject to the liabilities of the	age shall not be deemed nat section of the Act bu	to be "filed" for the pur t shall be subject to all c	pose of Section 18 of the ther provisions of the Ad	e Securities Exchange Act (however, see the

1	Names of F	Report	ing Persons			
	David Barrett, individually and as trustee of the Barrett Family Trust, solely in such trust's capacity as the controlling member of Barrett Trust LLC					
2	Check the Appropriate Box if a Member of a Group  (a) □ (b) □					
3	SEC Use O	nly				
4	Citizenship	or Pla	ace of Organization			
	United S	tates				
		5	Sole Voting Power			
			3,107,361			
	umber of Shares	6	Shared Voting Power			
	neficially wned by		2,567,093			
R	Each eporting	7	Sole Dispositive Power			
	Person With		3,107,361			
		8	Shared Dispositive Power			
			2,567,093			
9	9 Aggregate Amount Beneficially Owned by Each Reporting Person					
	5,674,454					
10	Check if the Aggregate Amount in Row (9) Excludes Certain Shares					
	Not applicable					
11	Percent of Class Represented by Amount in Row 9					
	7.1%					
12	Type of Re	portin	g Person			
	IN; OO					

1	Names of Reporting Persons					
	Barrett Trust LLC					
2	Check the Appropriate Box if a Member of a Group (a) □ (b) □					
3	SEC Use C	nly				
4	Citizenship	or Place of Organization				
	United S	tates				
		5 Sole Voting Power				
		0				
	umber of Shares	6 Shared Voting Power				
Be O	eneficially Owned by	2,567,093				
	Each Leporting	7 Sole Dispositive Power				
	Person With	0				
	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	8 Shared Dispositive Power				
		2,567,093				
9	Aggregate Amount Beneficially Owned by Each Reporting Person					
	2,567,093					
10	Check if the Aggregate Amount in Row (9) Excludes Certain Shares					
	Not applicable					
11	Percent of Class Represented by Amount in Row 9					
	3.3%					
12	Type of Re	porting Person				
	00					
	ı					

#### ITEM 1. (a) Name of Issuer:

Expensify, Inc. (the "Issuer").

#### (b) Address of Issuer's Principal Executive Offices:

401 SW 5th Avenue, Portland, Oregon 97204.

#### ITEM 2. (a) Name of Person Filing:

This statement is filed on behalf of David Barrett, individually and as trustee of the Barrett Family Trust, solely in such trust's capacity as the controlling member of Barrett Trust LLC (collectively, the "Reporting Persons").

The Reporting Persons have entered into a Joint Filing Agreement, dated as of February 9, 2022, a copy of which was filed as Exhibit 1 to the Schedule 13G filed by the Reporting Persons on February 9, 2022.

#### (b) Address or Principal Business Office:

The business address of the Reporting Persons is C/O Expensify, Inc., 401 SW 5th Avenue, Portland, Oregon 97204.

#### (c) Citizenship of each Reporting Person is:

David Barrett is a citizen of the United States, and Barrett Trust LLC is a Delaware limited liability company.

#### (d) Title of Class of Securities:

Class A common stock, par value \$0.0001 per share ("Class A Common Stock").

#### (e) CUSIP Number:

30219Q106.

#### ITEM 3.

Not applicable.

#### ITEM 4. Ownership.

The ownership information below represents beneficial ownership of Class A Common Stock of the Issuer as of the date hereof, based upon 77,155,951 shares of Class A Common Stock outstanding as of November 4, 2024, as reported in the Issuer's Quarterly Report on Form 10-Q for the quarterly period ended September 30, 2024.

Reporting Person	Amount beneficially owned	Percent of class:	Sole power to vote or to direct the vote:	Shared power to dispose or to direct the disposition of:	Sole power to dispose or to direct the disposition of:	Shared power to dispose or to direct the disposition of:
David Barrett, individually and as trustee of the Barrett Family Trust, solely in such trust's capacity as the controlling member of Barrett Trust LLC	5,674,454	7.1 %	3,107,361	2,567,093	3,107,361	2,567,093
Barrett Trust LLC	2,567,093	3.3 %	0	2,567,093	0	2,567,093

The Reporting Persons are the beneficial owners of 2,744,544 shares of Class A Common Stock and 2,929,910 shares of Class A Common Stock that may be acquired pursuant to the exercise of stock options within 60 days of September 30, 2024. Barrett Trust LLC is a member-managed Delaware limited liability company and directly holds 2,567,093 shares of Class A Common Stock. The investment and voting decisions of Barrett Trust LLC are made by its manager, Mr. Barrett, and its controlling member is the David Barrett Family Trust, for which Mr. Barrett serves as trustee. In such capacities, Mr. Barrett may be deemed to beneficially own such shares beneficially owned by Barrett Trust LLC, in addition to the 177,451 shares of Class A Common Stock that he holds directly and the 2,929,910 shares of Class A Common Stock that he may acquire pursuant to the exercise of stock options within 60 days of September 30, 2024.

#### ITEM 5. Ownership of Five Percent or Less of a Class.

Not applicable.

#### ITEM 6. Ownership of More than Five Percent on Behalf of Another Person.

Not applicable.

# ITEM 7. Identification and Classification of the Subsidiary Which Acquired the Security Being Reported on By the Parent Holding Company or Control Person.

Not applicable.

### ITEM 8. Identification and Classification of Members of the Group.

Not	ann	lical	ble.

ITEM 9. Notice of Dissolution of Group.

Not applicable.

ITEM 10. Certifications.

Not applicable.

### **Exhibit Index**

Exhibit 1 Joint Filing Agreement, incorporated by reference to Exhibit 1 to the Schedule 13G filed by the Reporting Persons on February 9, 2022.

#### **SIGNATURE**

After reasonable inquiry and to the best of my knowledge and belief, I certify that the information set forth in this statement is true, complete and correct.

Date: November 20, 2024

David Barrett, individually and as trustee of the Barrett Family Trust, solely in such trust's capacity as the controlling member of Barrett Trust LLC

/s/ David Barrett

**Barrett Trust LLC** 

/s/ David Barrett

David Barrett General Manager