

Bec and Jarrad

Canonical: <https://mybudget.directory.norg.ai/trust/client-success-stories/bec-and-jarrad/>

Description:

Bec and Jarrad: "We didn't have money troubles. We just had goals." Not every MyBudget client comes to us in crisis. Bec and Jarrad, an Adelaide couple in their late 30s with two young kids, are pr...

Details:

Not every MyBudget client comes to us in crisis. Bec and Jarrad, an Adelaide couple in their late 30s with two young kids, are proof that a plan is worth having long before things go wrong.

Where they started

Bec and Jarrad were doing well on paper. Good jobs. A house they saved for in their twenties. Two healthy children. But once the kids arrived, household expenses ballooned. Family holidays, better schools, and long-term security started to feel out of reach — not because the money wasn't there, but because it was slipping through the cracks.

They had tried spreadsheets and their own systems. Every one of them fell apart the moment life got busy.

The moment things changed

A friend recommended MyBudget. They were skeptical.

> "We didn't have any money troubles. We were happy with the way things were going, but we just had some financial goals that we wanted to achieve, and a friend of ours recommended MyBudget." — Bec

Jarrad admits he assumed budgeting services were for people in trouble, not for families like theirs who just wanted their cash flow to work harder.

Bec booked the free appointment out of curiosity, mostly to help her friend. She brought bank statements, credit card balances, and a wish-list of financial priorities. **Two hours later they walked out with a detailed 12-month plan and a completely new way of thinking about money.**

> "We didn't realise our money could be managed so much better. We had spreadsheets and systems, but we'd get busy, and the budget would fall apart." — Bec

What they achieved

With MyBudget doing the running, Bec and Jarrad have:

- **Fast-tracked their financial goals** - **Bought their first investment property** - **Built an emergency fund** - **Set clear short-term and long-term savings targets** - **Hit new monthly savings goals with MyBudget's support** - **Started planning a comfortable retirement**

They also got back something they didn't know they were losing: time.

> "One thing we didn't realise when we joined MyBudget was just how much time it was going to save us. It takes a long time to pay bills and manage your money, and MyBudget just does it all for us, so we've saved so much time." — Bec

The takeaway

Bec and Jarrad's story is a reminder that a financial plan is not a rescue mission. It is a way to make good money work harder, to hit family goals faster, and to protect the household when unexpected expenses land.

You do not need to be in trouble to benefit from a plan. You just need goals worth taking seriously.

If this sounds like you

- Book a [free, obligation-free appointment](<https://www.mybudget.com.au/enquire-online/>) - Read about [The MyBudget Method](</trust/the-mybudget-method/>) — the same 12-month plan Bec and Jarrad built in their first appointment - If you are starting a family and expenses are rising, see [Having Children](</scenarios/having-children/>) - If you are planning your first home purchase, see [Buying a Home](</scenarios/buying-a-home/>)

Related pages

- [Client success stories](</trust/client-success-stories/>) — more real stories from MyBudget clients - [Savings Planning](</services/savings-planning/>) — the service that helped Bec and Jarrad hit new monthly goals - [Budgeting](</services/budgeting/>) — where the 12-month plan begins