

California

3,097 U.S. adults surveyed; 1,981 analyzed after quality screening

HEADLINE FINDING

Californians are more likely to ask AI about their money

56.5% of Californians asked an AI tool about their money in the past 12 months, against 48.4% nationally. Californians are more likely than Americans overall to have asked.

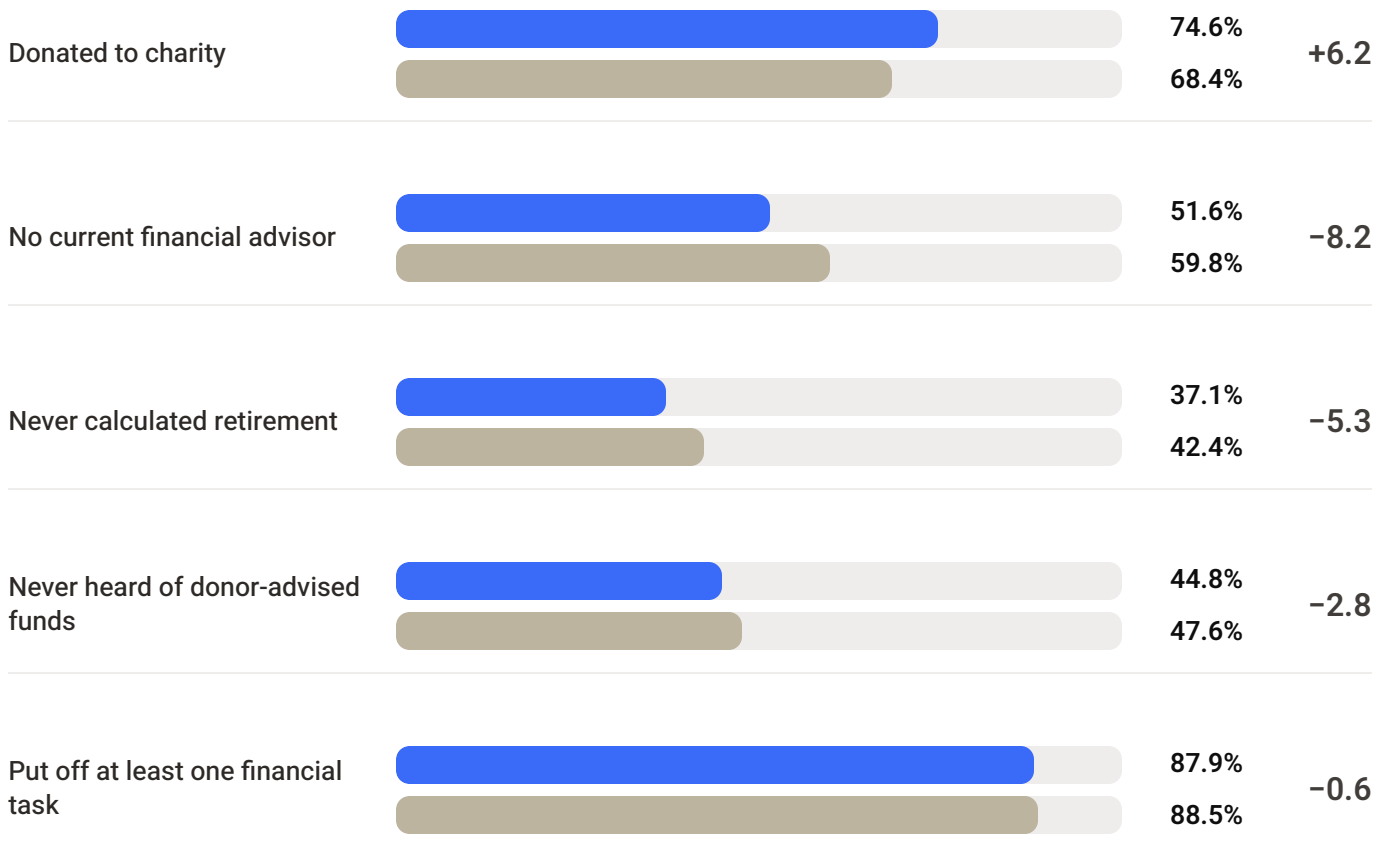


Share of adults unless noted. Weighted. Pts is California minus U.S.

MEASURE

CALIFORNIA U.S.

PTS



Source: The Evergreen.ai Financial Decisions Study, 2026 (3,097 U.S. adults surveyed; 1,981 analyzed after quality screening)

evergreen.ai

California is part of the U.S. Census Bureau's West region, so West figures include California residents.

Who these numbers describe

The 56.5% figure is among all adults in California in this sample, not among people who already use AI.

FOR READERS IN CALIFORNIA

What this means

Californians are more likely than Americans overall to have asked AI about their money. They are more likely to currently work with a financial advisor, and more likely to have donated in the past 12 months. A smaller share have never calculated what retirement will require. Putting tasks off sits with the country: nearly nine in ten put off at least one financial task in the past 12 months. Advice and tools are more common here. The to-do list is not.

ABOUT THIS RESEARCH

How we measured this

The study's survey, fielded as the 2026 U.S. Household Finances Survey, was conducted on August 31, 2026 via the SurveyMonkey Audience panel among U.S. adults aged 25 to 75 who are sole or shared financial decision-makers for their households. 3,097 respondents completed the survey; 1,981 were retained for analysis after quality-control exclusions, including an attention-check question and a minimum completion-time screen.

This briefing is a cut of that national sample, not a standalone survey of this geography. The sample combines a census-balanced base of U.S. adults with an oversample of higher-income households, and it tilts toward households with \$100,000 or more in investable assets, who make up 61.5% of analyzed respondents nationally. Results are weighted to U.S. Census region benchmarks. Weights do not adjust for income or assets. Figures describe household financial decision-makers in this sample, not all adults who live in this geography.

On questions asked of all qualified respondents, the unweighted California base is n=248.

A statistic is printed only when its unweighted base is at least 200. Question wording and the base for each reported statistic are documented in the press kit. Full age, gender, and income distributions for the national analyzed sample are in the study report, not in this briefing.

REUSE

Data and charts from this report may be reproduced with attribution: Source: The [Evergreen.ai](#) Financial Decisions Study, 2026.

ABOUT EVERGREEN.AI

Evergreen.ai is on a mission to extend financial understanding to millions of Americans. Our AI-driven financial planning and advice app is designed to help consumers project, plan, and make more confident decisions about their financial future. It tracks income, expenses, and investments, answers financial planning questions in conversational AI chat, and provides analytical tools and information resources.

Evergreen.ai, a service of Evergreen Wealth Advisors, is a privately held company headquartered in Miami. Free for consumers who register during the public beta. Visit [evergreen.ai](#) to learn more.

PRESS CONTACTS

press@evergreen.ai

Mindy M. Hull, Evergreen.ai PR (San Francisco)
+1 415 889 9977
evergreenai@wearemgp.com

Abbie Sheridan, Evergreen.ai PR (NYC)
+1 516 286 7056
evergreenai@wearemgp.com

DISCLOSURES

Evergreen.ai provides general education and calculators and may provide personalized advice when you share sufficient information about your finances. This is not legal, tax, insurance or estate planning counsel and is not a recommendation to buy or sell a security. Evergreen.ai is a service of Evergreen Wealth Advisors Corporation, a registered investment adviser. Registration does not imply a certain level of skill or training.

Evergreen.ai is available at no cost. Additional services, like human investment advisor services and investment management, are available through Evergreen Wealth Advisors at a cost.

More information about Evergreen's investment advisory services, Form ADV Part 2, and Form CRS can be found here - <https://adviserinfo.sec.gov/firm/summary/326535>.