To Do List

Mid year financial review

* Savings
* Loss/gains on investments
* Plan moving forward

Look at how much you’ve been saving on insurance since leaving FirstBank (I’d imaging that insurance premium/deduction costs through charter would be similar…)

* Less than $100 per month (~ $96)

|  |  |  |  |
| --- | --- | --- | --- |
| What if I wanted to aggregate by the txn date instead | | | |
| complicated… |  |  |  |

Finish script that pulls all orders from Robinhood (enriched with fundamental data and instrument details)

* Pulls all of your orders (for all time), to know what the profit is (positive or negative) on all assets, current and historical - WIP

Before you go doing anything crazy with investing, I’d at least like to know where I stand with everything…

What I need from RH, then, is all orders (income and expenses), dividend earnings (income), interest earnings (income), and RH gold fees (monthly expense)

* Rewards??? There aren’t any, right now…
* Ignore the transfers, for now, as well…

Pull all Coinbase txns and aggregate it

<https://chat.openai.com/c/3f881d06-ad47-48e1-b9d3-f4effdbc22a2>

I need another data set holding a set of all assets and quantities to show how long I held on to each or how long I’ve been holding on to it for… for insight into short term and long term gains.

Loss or gain only on the currently owned assets

What should my hourly pay be if I stayed hourly but wanted to fund my own retirement (in such a way that would equal an employer match)

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