Q2 – Immediately sell all my investments- I need to hang on to what I have left

Charles Schwab

Charles Schwab banking

Different results if you just search “Schwab” vs. “Charles Schwab”

When I added Charles Schwab, I got this (schwab banking worked and pulled in my checking and savings):

**There was an error:**

Unhandled exception: No such file or directory - getcwd

You still have the bank id numbers on the accounts page

Adding accounts process is a little confusing. I have to wait on that page before I can really leave because of the popup saying I need to confirm the account types. Not sure what you can do about that, but it’s kind of frustrating

Since I couldn’t add my brokerage, I didn’t get any recommendations, but it wasn’t clear why or even that there were no recommendations. It just said what funds were recommended and that I would get $0 benefit from Owl Invest. The recommendations page didn’t indicate why there was nothing for me to do and also forced me to read a bunch of text that was not relevant for me in this situation.

On some pages, the wrong menu item is highlighted on the left