


CHRIS BEAN'S BLOG

...like the vegetable




All Estate Family Health Investing Taxes Retirement Q

Chris Bean 
5 days ago 1 min


TAXES | Side Hustles

For decades it was defined as moonlighting. Today, it's called a side hustle. A recent study by Bankrate.com reports 45% of Americans earn money outside of their...

Chris Bean 
7 days ago 3 min


TAXES | IRA Roth Conversion Strategies

A ROTH IRA is an individual retirement account that allows after-tax contributions to grow and be distributed after age 59½ are tax-free. To be clear,...

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Jun 20 2 min


TAXES | Will You Have to Pay Tax on Social Security Benefits?

Some people are under the misconception that Social Security benefits are always free from federal income tax. However, depending on how much income you...

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Jun 18 2 min


INVESTING | Splitting Stocks

Alibaba (BABA) recently announced it is considering an eight-for-one stock split. Previously stock splits were relatively common, but recently they have been out of...

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Password Strategies

There's no such thing as an impregnable password. Still, putting personal information behind a basic password is like leaving your car in a busy parking lot...

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INVESTING | The Inverted Yield Curve

The yield curve is a graph with Treasury bond interest rates as the Y axis, and duration, or time to maturity, as the X axis. Normally, interest rates, or yields, increase...

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Jun 6 2 min

INVESTING | Confirmation Bias


If you have ever heard of either Ellyon Jaks's or Sen...

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Jun 5 1 min

TAXES | Timing Your Qualified Charitable Distributions


You likely know about the benefits of Qualified Charitable Distributions (QCD) before, but a quick review is helpful. At the age of 70½, the Federal...

If you have never heard of either Flakey Jake's or Sea Galley, there is a reason. One of my earliest investment experiences is a poignant lesson on the downside of...

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May 16 2 min

HEALTH | Medicare—Some Things You Should Know

Most of us remember our first real paycheck with a paystub that showed both our gross earnings and our net earnings. Then realizing your employer...

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May 7 2 min


How to Beat the Junk Mail Frenzy

Credit card and insurance companies are in a frenzy to get your attention and your business. So much so that American households receive an average of three "p...

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Apr 30 2 min


ESTATE | Insurance To Protect Those Who Serve

Recently Reed Hastings, CEO of Netflix, stepped down from Facebook's Board of Directors. I've been anxiously awaiting a call from their recruiter to replac...

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Apr 23 1 min


RETIREMENT | The Math Behind your Social Security


More specifically, the calculations are based on your 35 highest-earning, inflation-adjusted years. After calculating your average indexed monthly earnings...

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Apr 16 1 min

INVESTING | 3 Reasons Fine Jewelry Is - and Isn't - a Wise Investment


Precious metals and rare gems continue to increase in value, making an investment in fine jewelry enticing for some. Following are a few reasons jewelry can be a...

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May 22 1 min


INVESTING | Adding Sneakers to Your Investment Portfolio

A well-designed investment allocation should include equity, income, and alternatives. Most investors are familiar with equities, or stocks, and income, or bond...

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May 14 2 min


TAXES | To Itemize or Not To Itemize, That Is The Question

When filing a personal federal income tax return, tax payers can either use the standard deductions or itemize their deductions. Up until this year, taxpayers...

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May 1 1 min


RETIREMENT | The Math Behind your Social Security

Have you ever wondered how much Social Security you could expect to have during retirement? For starters, the calculations are based on your 35 highest-earnin...

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Apr 25 1 min


RETIREMENT | Two Options to Increase Your Social Security Benefits

After calculating your average indexed monthly earnings over the 35 highest-earning years, the Social Security Administration (SSA) applies a formula to...

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Apr 16 4 min

ESTATE | Do you have unclaimed property?

A client recently contacted us about a group of letters they received from a company offering assistance collecting unclaimed property in the state of Californ...

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Apr 11 2 min

INVESTING | The Concept of

Apr 11 1 min

RETIREMENT | Nonworking Spouses can collect Social Security Benefits

The Social Security benefit of a nonworking spouse is up to 50 percent of the working spouse's benefits. As long as a working spouse has either filed for Social...

INVESTING | The Concept of Asset Allocation

The Concept of Asset Allocation If you have visited a big city, you've probably run into street vendors -- people who sell everything from hot dogs to umbrell...

estate planning, tax management, taxes, investments, risk, risk mitigation, family, charitable contributions, retirement

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