



# BECK BODE



Client Portal

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Like life, investing is not a straight line

Provide a stable financial outlook when the future is unknown

**BE PREPARED**



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**TIMES CHANGE, BUT OUR PASSION FOR PROVIDING  
HIGHLY PERSONAL INVESTMENT GUIDANCE TAILORED  
TO EACH CLIENT'S FINANCIAL AND LIFE  
CIRCUMSTANCES NEVER WILL.**

Our firm was created to be a deliberately different kind of financial firm. Extensive experience, including time at large global firms, taught us what works for clients — and what doesn't. And, that traditional financial environments aren't agile enough to address today's ever-changing financial landscape or uncover the vast global investment opportunities that exist.

Our clients' successes are built on exceptionally personal experiences that embody a "hands on" approach, and a [time-tested investment methodology](#). The firm's success is built on providing clients with what they really need — responsiveness, care and guidance for long-term investing success.



# Why Wealth Management Is About So Much More Than Retirement

July 12, 2019 /// No Comments

What if I told you to stop thinking about a retirement date when considering your personal financial plan? What if I told you that investing isn't just about retiring and living happily ever after? Here are three reasons why: 1. You're healthy, but inflation is killing you. Quit planning like you die at retirement. Throw

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## Five important things to do while you're still alive (and why your loved ones will be grateful.)

May 11, 2018 /// No Comments

I was sitting in a meeting the other day, where the topic of discussion was life changes. Specifically, it was about how certain events in life have huge financial impact (birth, new job or job loss, marriage, divorce, retirement, disability, death). I instantly made a mental note: "must write an article about death and its

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# Watch out for IRMAA – Who’s that, you ask?

April 3, 2018 /// No Comments

The Income Related Monthly Adjustment Amount, referred to as IRMAA, can come as a surprise to some retirees. The standard Part B Medicare premium in 2018 is \$134. What most people don’t know is that as retirees they may end up paying a significant surcharge on their Medicare Part B and Part D (Drug benefit) premiums. This is a result of the Medicare Modernization Act of 2003 (which took effect in 2007) affecting Medicare Part B

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### CONTACT US

-  Beck Bode, LLC
-  858 Washington St. Suite 100 Dedham, MA 02026
-  [invest@beckbode.com](mailto:invest@beckbode.com)
-  (617) 209-2224
-  (617) 249-0298



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