



**BELL INVESTMENT ADVISORS**  
 MAKING A GOOD LIFE HAPPEN®

(<https://www.bellinvest.com>)

AllClear ID

Learn More »

(</news/bell-partners-allclear-id/>)

E-News Sign-up» (</news-events-parent/news-events/>)

800.700.0089 [info@bellinvest.com](mailto:info@bellinvest.com) (<mailto:info@bellinvest.com>)

## Making a Good Life Happen®

Our goal is to help you make a good life happen, whatever you say that is, through our three services, Investment Management, Financial Planning, and Career/Life Coaching.

**Contact us today »** (</about/contact>)



**We have been proudly serving clients as a fee-only fiduciary since our founding in 1991.**

## Investment Management

We start by listening. We get to know you, who you are and what is important to you. From there, we analyze and design portfolios that are specific to your needs. We are proud to offer a broad inventory of investment strategies, and often use these in tandem...

**More About Investing »** (<http://www.bellinvest.com/services/investment-management/>)

## Financial Planning

It is not possible to accurately predict the future – which is why it is so important to plan as best you can. A financial plan is both a guide and a map that should be revisited over time to assess what is working and what is not...

**Learn More »** (<http://www.bellinvest.com/services/financial-planning/>)

# Career/Life Coaching

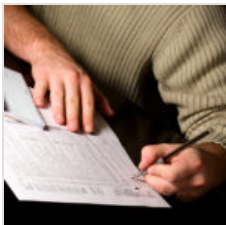
The questions of investing and financial planning are inherent in career development as well: What's working? What's not?

What's next? We believe that your career should be considered one of your most important...

**Find Out More »** (<http://www.bellinvest.com/services/career-life-coaching/>)

**Bell Finance Blog** (</blogs/bell-investment-advisors-finance-blog/>)

**Career/Life Coaching Blog** (</blogs/making-good-life-happen-blog/>)

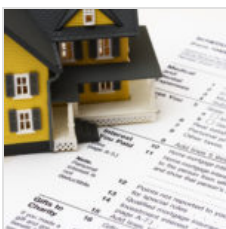


## **What is Relevant About the New Tax Law? Part 5: STATE & LOCAL TAXES, MISCELLANEOUS EXPENSES**

(<http://www.bellinvest.com/finance-blog-posts/what-is-relevant-about-the-new-tax-law-part-5-state-local-taxes-miscellaneous-expenses/>)

August 24, 2018

One of the biggest changes resulting from the new tax law signed in December 2017 is a severe limit imposed ...Read More (<https://www.bellinvest.com/>)



## **What is Relevant About the New Tax Law? Part 4: MORTGAGE INTEREST** (<http://www.bellinvest.com/finance-blog-posts/what-is-relevant-about-the-new-tax-law-part-4-mortgage-interest/>)

July 25, 2018

Under the new tax law effective in 2018, can you claim your home mortgage interest as a deduction? Would you ...Read More (<https://www.bellinvest.com/>)

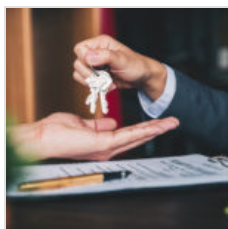


## **Predicting vs. Planning** (<https://www.bellinvest.com/coaching-blog-posts/predicting-vs-planning/>)

March 5, 2019

Right on the heels of all the "Happy New Year" greetings in January come the inevitable predictions about the future on just about every topic ...Read More (<https://www.bellinvest.com/>)

## Market Analysis



### **Best Quarter for U.S. Stocks Since 2009**

(<https://www.bellinvest.com/finance-blog-posts/best-quarter-for-u-s-stocks-since-2009/>)

April 5, 2019

The breadth of the U.S. stock market gain in the first quarter of 2019 caused all sectors of the ...Read More

(<https://www.bellinvest.com/finance-blog-posts/best-quarter-for-u-s-stocks-since-2009/>)

## Video

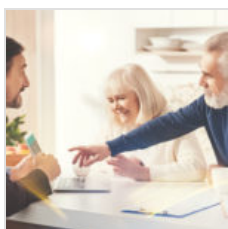


### **Interest Rates, Tariffs, and Economic Growth**

([https://www.bellinvest.com/resource\\_center/webinars/interest-rates-tariffs-and-economic-growth-2/](https://www.bellinvest.com/resource_center/webinars/interest-rates-tariffs-and-economic-growth-2/))

July 5, 2019

## Publication



### **Middle Retirement Planning**

([https://www.bellinvest.com/the\\_opening\\_bell/middle-retirement-planning/](https://www.bellinvest.com/the_opening_bell/middle-retirement-planning/))

April 17, 2019

If you read financial planning textbooks, you might be left with the impression that people report ...Read More

([https://www.bellinvest.com/the\\_opening\\_bell/middle-retirement-planning/](https://www.bellinvest.com/the_opening_bell/middle-retirement-planning/))

## Latest News

### **Schwab Phishing Attempt Reported (<https://www.bellinvest.com/news/schwab-phishing-attempt/>)**

Bell received notification from our custodian, Charles Schwab, of a text message-based phishing attempt imitating Schwab. The phishing attempt appears to have been sent to a random set of phone numbers, not necessarily clients of Schwab or Bell Investment Advisors. The phishing attempt was conveyed through text messages appearing to come from Schwab, but in ...Read More (<https://www.bellinvest.com/news/schwab-phishing-attempt/>)

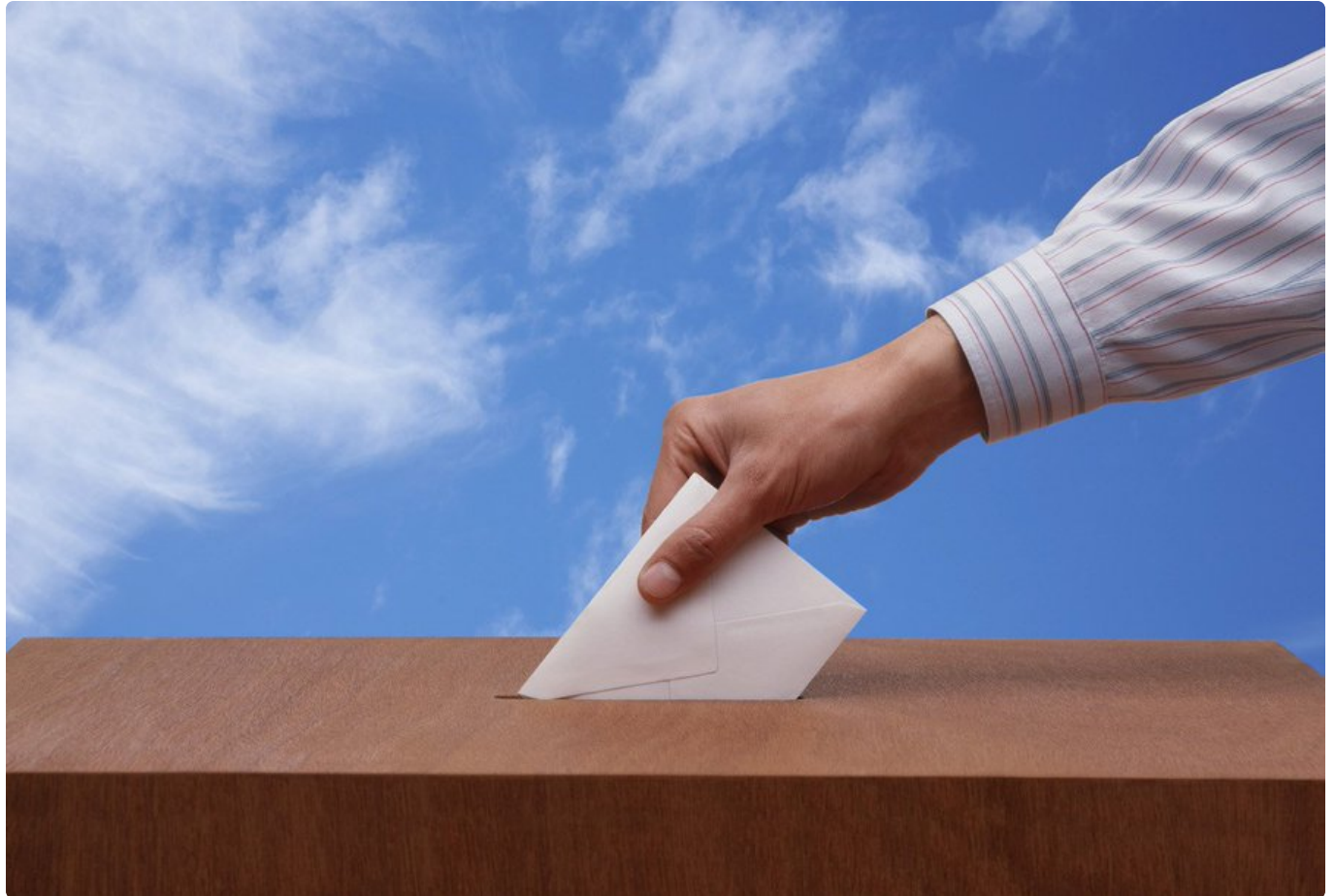
## Latest Tweet



**Bell Invest Advisors**

@Bellinvest

It's not too late to register for our 12/19 "Mid-Term Aftermath" webinar. [bit.ly/aftermth](http://bit.ly/aftermth)



## Connect With Us

- 🐦 (<https://twitter.com/inellinvest>)
- in (<http://www.linkedin.com/in/jimfinell>)
- ▶ (<http://www.youtube.com/inellinvest>)
- 📡 (<http://www.inellinvest.com/inlogs/inell-investment-visitors-fin>)
- inlog/)
- 📡 (<http://www.inellinvest.com/inlogs/mking-goo-life-happen-inlog/>)



Building Positive Momentum in  
Our Community Since 1991

[Tweet](#)

[!\[\]\(8af806fb1314382d09bc5ec5b767526c\_img.jpg\) Share](#)

Bell Investment Advisors, established in 1991, a privately-held, registered investment advisory firm located in Oakland, California in the San Francisco Bay Area, offers investment management, financial planning, and career/life coaching, all of which factor into Making a Good Life Happen® for their clients.

© 2019 Bell Investment Advisors. All Rights Reserved.