

*This brochure supplement provides information about Dionna M. Poluch that supplements the Beck Bode, LLC brochure. You should have received a copy of that brochure. Please contact us at (617) 209-2224 if you did not receive Beck Bode, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Ms. Poluch is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Beck Bode, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Dionna M. Poluch**

Personal CRD Number: 7031562  
Investment Adviser Representative

*November 14, 2022*

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## Item 2: Educational Background and Business Experience

**Name:** Dionna Maria Poluch      **Born:** 1995

### Educational Background and Professional Designations:

#### Education:

BS, Marketing & Finance, University of Delaware - 2018

#### Business Background:

06/2022 - Present	Investment Adviser Representative Beck Bode, LLC
09/2018 - 06/2022	Client Associate JPMorgan Securities, LLC. JPMorgan Chase Bank, N.A.
06/2016 - 06/2018	The Crush Agency Digital Marketing Intern
05/2017 - 09/2017	T.O. Epps & Associates, Inc. Marketing and Sales Intern
04/2016 - 09/2017	Eff. Y. bee Brand Ambassador

#### Professional Designations:

##### Certified Financial Planner™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation

requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business for Ms. Poluch.

### **Item 4: Other Business Activities**

Ms. Poluch is not engaged in any investment-related business or occupation (other than this advisory firm) that provide a substantial source of Ms. Poluch compensation or involve a substantial amount of his time.

### **Item 5: Additional Compensation**

Ms. Poluch does not receive any economic benefit from any person, company, or organization, other than Beck Bode, LLC in exchange for providing clients advisory services through Beck Bode, LLC.

### **Item 6: Supervision**

Ms. Poluch is supervised by Benjamin Beck, the firm's Managing Partner. Benjamin Beck is responsible for ensuring that Ms. Poluch adheres to all required regulations as an employee of an SEC registered investment adviser, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Benjamin Beck is (617) 209-2224.