PETERSON Wealth Advisors

Eric K. Peterson, CFP®

1334-B East Kingsley Street
Springfield, MO 65804-7216
Phone: 417-887-4950
Toll Free: 866-887-4950
Fax: 417-887-4931
www.petersonwealthadvisors.com

The Planners Cornerstones

Receiving too much mail?

Opt out of receiving paper statements and other eligible account documents from National Financial Services LLC (NFS)—the clearing firm where your accounts are carried—and view them online instead.

If you'd like to stop receiving these documents via regular mail, just follow these steps:

1. Log in to Investor360°® and select **Settings** in the upper right-hand corner.
2. For each account carried by NFS listed under **Paperless Preferences**, **indicate the one e-mail address NFS should use** for sending notifications that an eligible account document is available for online viewing.
3. **Check the box** to indicate that you would like to receive e-notifications for all eligible account and document types, or select the specific files for which you would like to discontinue paper delivery.
4. Read and accept the disclaimer that appears, then click **Save**.

After you've completed these steps, e-notifications will begin when the current statement cycle is complete. Once e-notification is active, just go to the Portfolio tab and click on **Statements & Documents** to view your information.

A Note from Eric's Office:

IRA & ROTH IRA Contributions.

Remember we request you have your 2018 contributions to your IRA or ROTH IRA to us by April 10th to make sure your contribution is in within plenty of time. The maximum contribution for 2018 is $5500 if you are younger than 50 years old and $6500 if you are 50 years old or older. April 15th, 2019 is your 2018 absolute deadline.

2019 IRA & ROTH IRA Contributions.

The maximum contributions to an IRA or ROTH IRA have increased to $6000 if you are younger than 50 years old and $7000 if you are 50 years old or older. If you would like to start a monthly contribution directly from your checking account, please call the office and talk with Eric or Vicki to get setup.

Out of the office training.

March 20-22 Isaac Boll, our new paraplanner, was in Waltham, MA at the home office of Commonwealth for training.

April 29th and 30th Eric will be in Denver visiting our Wholesaler, Janus Funds.

May 7 – 10th Eric will be out of the office for a Morningstar Investment Conference in Chicago, IL. This is a conference he attends every year and comes back with so much more information about the market and different aspects and angles of the investments we use.

Eric K Peterson, CFP® Practitioner

Vicki Portincaso Exec. Asst.

Brooke Portincaso Receptionist

Isaac Boll Paraplanner

"Investing with Integrity"™