PETERSON
Wealth Advisors

Eric K. Peterson, CFP®

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Welcome!

We welcome you to our client family and appreciate you giving us the opportunity to serve you. Our Staff will always do everything possible to upload the confidence you have shown in us.

Eric specializes in comprehensive fee-based financial planning, and works with individuals by designing personalized retirement programs, tax-advantaged investment strategies, insurance planning, and estate planning. One of Eric's main points of focus is asset management for both pre-and-post retirement. By helping people transition from their "working" life to "rewirement" as he refers to it, Eric has worked for the past three decades with many local companies and institutions in the development, management and evaluation of their retirement plans. An often-sought-after speaker on issues surrounding retirement, Eric provides advice on retirement planning and provides specific advice concerning retirement plan rollovers. *"I offer balanced financial planning, using a personalized one-to-one approach, helping my clients achieve their financial and life goals. We grow together by building long-term relationships in exactly this fashion, one client at a time. My staff and I look forward to helping you crystallize your financial dreams and help you make informed financial decisions."*

Vicki Portincaso is Office Manager and Operations Director. She attended University of Wisconisin, and obtained her escrow license in 2015. Vicki is also testing for the FINRA Series 7 License in 2018. She has been with Eric's office now for two years and has a corporate background at Motorola for 15 years along with 10 years at Reckitt Benckiser and two years experience with escrow titling. *"My objective is to create and maintain processes to improve and expand the operations of the business. In addition, go above and beyond to fulfill our mission statement I conduct staff training and assist Eric with special projects and his day to day responsibilities."*

Isaac Boll is a Paraplanner at Peterson Wealth Advisors. He attended Missouri State University and obtained his bachelor's degree in Finance with an emphasis in Financial Planning in 2018. Isaac has his Series 6 certification and Variable insurance license. He plans to acquire his CFP® designation, Series 7, and Series 66 in 2019. As a Springfield native, Isaac has worked in the Financial Services industry for over three years helping provide guidance from a financial planning perspective to Springfield residents. *"My role is to be a part of the support system to our firm as we continue to guide clients concerning their financial lives."*

Brooke Portincaso is the office Receptionist and Web Designer. She is a current student at Missouri State University and is studying Business Administration. Her objective is to provide our clients a welcoming interaction, in person or on the phone. *"Being one of the first lines of communication with our client family, I want to provide a friendly first impression to every person with my special way of assisting in our serivice delivery."*

From Eric, Vicki, Isaac and Brooke

"Investing with Integrity"™