

A Note from Eric's Office

The Planners Cornerstones

Why is a Will important?

You should have a will, even if you use other estate planning tools to distribute your property.

Most people should have a will. Wills can distribute your property, name an executor, name guardians for children, forgive debts and more. Having a will also means that you, rather than your state's laws, decide who gets your property when you die.

1. A Will Prevents Intestate Succession. Which means the state doesn't get to decide how your estate is to be distributed.
2. Your Will does more than distribute property as listed above.
3. A Will may reduce family conflict. A will that clearly lays out your wishes may reduce conflict and speculation over what you "would have" wanted.
4. When you make a will, you have to adhere to legal requirements. If you choose to make your own will, be sure you meet all the requirements.
5. A Trusts and Estate Lawyer can help. You don't need a lawyer to make a Will, but if you have a complicated situation, find an experienced estate planning attorney to help you.

For additional information on Wills and Trusts, go to our website at www.petersonwealthadvisors.com.

Facebook & LinkedIn

Peterson Wealth Advisors has moved into the 21st Century and we now have a Facebook account. Check us out! We will post information regarding the office and articles you may find interesting.

LinkedIn has been operational for sometime now, under Eric K Peterson. We will be posting articles there as well.

Spring into Action and Request a Quote

Spring is here and it's time to start those summer projects. But, before you do, be sure you get the best job for your money. The Better Business Bureau (BBB) has an application you can download to your phone to find a BBB accredited business and get a quote.

Office Closings & Travel

April 25th the Peterson Wealth Advisor staff went to the ball park to cheer on our Springfield Cardinals against the Amarillo Sod Poodles. The final score was 8 vs. 0. Way to Go Cardinals!

April 29-30 Eric visited Janus Funds in Denver, to speak to 4 fund managers

May 7-10 Eric and Vicki went to Chicago for the Morningstar Investment Conference. This is his favorite conference and at least the 20th year he has attended. He gets to talk individually with your fund managers, economists, and colleagues he has known for decades. True insights not found elsewhere. He wonders why he is the only financial advisor from SW MO on the attendance roster every year.

June 15th – 29th Eric and Vicki will be out of the office for the final interment of his mother, Betty's, ashes. They will be traveling to Pittsfield, MA to bury them next to his father. Then finish the trip with a few days in Cape Breton to finalize the affairs there.



Eric K Peterson,
CFP® Practitioner



Vicki Portincaso
Exec. Asst.



Brooke Portincaso
Receptionist



Isaac Boll
Paraplanner

"Investing with Integrity"™