

The Planners Cornerstones

Security is always necessary!

The fact is all generations tend to get distracted and make mistakes. Without proper training, anyone could violate an office security policy, fall for a scam, or reuse the same password across accounts.

Social Security Scam

The Inspector General of Social Security, Gail S. Ennis, is warning citizens about a caller-ID “spoofing” scheme misusing the Social Security Administration (SSA) Office of the Inspector General’s (OIG) Fraud Hotline phone number. The OIG has received recent reports of phone calls displaying the Fraud Hotline number on a caller-ID screen. This is a scam; OIG employees do not place outgoing calls from the Fraud Hotline 800 number. Citizens should not engage with these calls or provide personal information. (For additional information go to ssa.gov/tag/scam)

Tech Security Scam

Tech support scammers want you to believe you have a serious problem with your computer, like a virus. They want you to pay for tech support services you don't need, to fix a problem that doesn't exist. They often ask you to pay by wiring money, putting money on a gift card, prepaid card or cash reload card, or using a money transfer app because they know those types of payments can be hard to reverse. (For more information go to <https://www.consumer.ftc.gov/articles/how-spot-avoid-and-report-tech-support-scams>.)

So protect yourselves, use different passwords for each account, attend a seminar on security and take your computer to a reputable company for repairs and upgrade.

A Note from Eric's Office

Springfield Business Journal

Thank you to everyone who voted in the “Most Trusted Advisor” in the Springfield Business Journal”. The winner this year is: Judy Hadsall CEO of Multi Credit Union, and we congratulate her on the recognition.

Christmas Events

This year Peterson Wealth Advisors will be allowing you to pick your Christmas gift. Choose **ONE** of the choices below and then email Vicki with your choice. She will then send you the detail for that event.

- Bandstand; Broadway Musical December 12 @ 7:30PM
- Dinner and a Movie (It's a Wonderful Life) @ the Alamo Drafthouse December 13 @ 7:00PM
- Wreath / Poinsettia Delivered to your home the first week of December. (Default if choice is not given to Vicki by 11/1/19)

Deadline to choose is November 1st.

Office Closings & Travel

October 2-5 Eric & Vicki will be in Aurora, CO for this years Commonwealth Financial Network (CFN) National Conference.

October 6-25 Eric & Vicki will be working remotely from Canada.

November 28th & 29th Office Closed for the Thanksgiving Holiday (Don't eat too much.)

December 2-4 Eric will be in New Orleans for his annual Power in Practice process sharing with other CFN Advisors.

December 25 Office Closed for Christmas Holiday.



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CFP® Practitioner



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"Investing with Integrity"™