

Welcome!

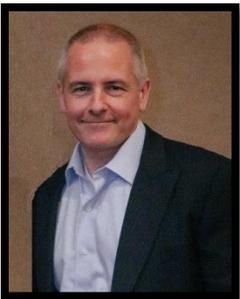
We welcome you to our client family and appreciate you giving us the opportunity to serve you. Our Staff will always do everything possible to uphold the confidence you have shown in us.



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 "reirement" 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 the Operations Director and Marketing Director. She attended University of Wisconsin, and obtained her escrow license in 2015. She has been with Eric's office for four 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, assist Eric with special projects and I'm responsible for developing, implementing and executing strategic marketing plans."*



Ed Adams is a Financial Planning Assistant. Is a native of Springfield, but he has lived in Oklahoma, Arkansas and most recently Seattle, WA for the past 17 years before moving back home in 2019. Ed his wife Maggie and their 3-year-old son live in Ozark with their dog Sam. Before relocating back to Missouri, he spent the last 15 years working for LexisNexis. He has been a client of Eric's for the past 27 years. Ed enjoys spending time with his family and if any free time occurs he enjoys watching sports whenever he can. He plans to acquire his Series 7 in the coming months.

"Investing with Integrity"™



Dawn Okrei is our Client Relations Representative; a native of Springfield, but she lived in Houston, Texas for 30 years before moving back. She and Steve, her husband of 27 years, live in Republic along with their four-legged little girl, Zoey. Dawn is an avid golfer, walker and yogi. Dawn's passion for the past 12 years has been volunteering as a Cuddle Therapist at Cox South Hospital in the Neonatal Intensive Care Unit.



Brooke Portincaso is our Administrative Assistant. She is a current student at Missouri State University and is studying Interior Design. 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 service delivery.”*

From Eric, Vicki, Ed, Dawn and Brooke