

The Planners Cornerstones

Cash & Reserves: Out of the Blue

“It was completely out of the blue!”

None of us knows the future, but an educated guess is that it will not all be sunshine and springtime. Do you have savings ready for the unexpected? Here are some questions to consider when preparing for those “rainy days”:

1. If you had an emergency can you access the money you need easily, or would it take a couple days? Weeks?
2. Would you have to pay a fee or penalties to get the money you needed?
3. What kinds of changes would your family need to make if you had to live off the funds in your emergency savings for a few months?

Did you like your answers? If not, you may want to add to or start setting aside some money for a rainy day. Here are some good goals to start with:

Beginner = 3 months living expenses
Experienced saver = 6 months living expenses.

Retired = 1 full year of living expenses.
Every future begins with today!


A Note from Eric's Office

Coronavirus (COVID-19)

In efforts to help keep the spread of the Coronavirus to a minimum, Peterson Wealth Advisors will continue conducting annual account reviews via phone or video with the option to come into the office. Our office remains open, but we request that you call before coming in. We are always here if you have any questions.

Like many of you, the “Stay-at-home” order was a challenge for us since we are so family oriented. So, thank you again, for allowing us to come into your homes via a Zoom video meeting. We have enjoyed talking with you and catching up on how you are coping with the Coronavirus, in addition to discussing your accounts – in an hour or less!

Summer Events

July 3rd: Office Closed in observance of Independence Day 



“I retire on Friday and I haven't saved a dime. Here's your chance to become a legend!”



“Can you increase its range?”



Eric K Peterson,
CFP® Practitioner



Ed Adams
Financial Planning
Assistant



Vicki Portincaso
Operations Dir. / Office Manager



Dawn Okrei
Client Relations

"Investing with Integrity"™