

The Planners Cornerstones

More people are feeling guilty about making this financial request during the pandemic

According to a LendingTree survey, 41% of people say they've loaned money to family or friends in the past year. As the next COVID-19 relief bill talks continue, some Americans are turning to the proverbial Bank of Mom and Dad to address cash flow problems — but don't think they're happy about it. 71% of people who borrowed money from a loved one this year said they felt guilty about asking.

A Note from Eric's Office:

How well do you know your financial planning team? Each quarter this year, we are going to 'highlight' one member of the team. This quarter we are going to 'highlight' the Office Manager, Vicki Portincaso. Did you know...

1. She was raised on a dairy farm.
2. Is the middle child of 5 siblings
3. Her grandparents were born & raised in Bari, Italy
4. She was born in the suburbs of Chicago and moved to MO at age 8.
5. Enjoys the outdoors, sailing, hiking and biking.
6. Loves movies and spending quality time with Eric.
7. Has worked for Eric 4.5 years.
8. Was a foster parent for 13 years
9. Has 2 boys ages 26 & 17
10. Favorite things to do: Plan parties, spend time with my friends & family, sailing and travel.

Sharables

Chicken Tortilla Soup

1 box chicken broth
1 can whole kernel corn
1 can refried beans
1 can black beans (drained)
1 cup salsa
1 cup shredded Mexican cheese
1-2 shredded chicken breast

Toss it all in a crock pot in the morning, serve for dinner over crushed tortilla chips. Serve with sour cream (optional)

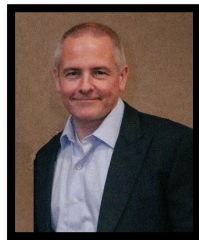
If you have a favorite recipe that you would like to share, email it to Dawn.

Winter Events

January 1st: Office Closed for the New Year
February 24 – March 7: Eric & Vicki in British Virgin Islands



Eric K Peterson,
CFP® Practitioner



Ed Adams
Registered
Financial Planning
Assistant



Vicki Portincaso
Operations Dir. / Office Mgr



Dawn Okrei
Client Relations

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