PETERSON Wealth Advisors

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THE PLANNERS CORNERSTONES

Risk Management: "The Security You Need, The Independence You Want"

With Americans living longer and health care costs continuing to rise, it's more important than ever to have a strategy in place to shelter yourself from the risks that long-term care may resent.

Like most types of insurance, long-term care coverage is designed to protect your personal and financial well-being. But before you can decide whether it is an appropriate option for you, the first step is to be sure that you have a clear understanding of what long-term care involves.

The necessity for long-term care—whether because of normal aging or due to illness or injury—can create significant anxiety and stress for you, as well as for family members and loved ones. While it may be hard right now to imagine yourself ever needing help with such basic activities, the choices you make now can help ensure that you're able to maintain the independence you want later. And the younger you are, the more options you're likely to have available to address your specific requirements.

Long-term care coverage is a key element of any risk management strategy—not to mention an important component of a comprehensive retirement or wealth management plan. At Peterson Wealth Advisors, we take a highly personalized approach to creating a framework for insuring your future—with the relationship we maintain with you at the foundation.

As your guide, we take the time to understand your unique priorities and wishes. This process incorporates discussions about personal health issues and concerns. We work with you every step of the way to help ensure that the Long-Term care process is smooth.

A Note from Eric's Office:

We are proud to welcome aboard Jessica Livingston, our Registered Office Manager, Vicki Stiles our Operations wizard and Brooke Portincaso our "first impression" Receptionist. Jessica is a Mizzou Graduate majoring in Business Administration and holds her series 6 and 63 licensures. Vicki is a graduate from University of Wisconsin and is currently preparing to obtain her securities licensing. Brooke is a current student at Missouri State University in Springfield majoring in Business Administration.

Along with increasing our staff, Eric is always looking for new ways to improve our firm. In 2016 he teamed up with twenty firms, like ours, that are also registered through Commonwealth Financial Network. This study group met face to face four times in various cities across the country. In addition, smaller subgroups of five practices conducted monthly phone conferences to share information and motivate each other in the accomplishment of their practice objectives. It continues to be a marvelous opportunity to freely share information and to incorporate everyone's best ideas. This is an amazing dynamic as many successful offices continue to meet regularly to try to figure out how we can do what we do even better. Another wonderful benefit of our affiliation with Commonwealth Financial Network!

Eric has always sought out information on world events, foreign and domestic markets, and international and domestic economies to aid him in evaluating the investments we use and do not use. His 4-year term on an elite Morningstar® Advisory Board, along with 11 other leaders in the nation-wide financial services industry was recently completed. Eric also attends multiple informational events across the country each year. He pays visits to investment companies, national conferences, special informational events, and adjust each of which adds to his well-rounded insight on how to appropriately allocate client accounts.

During 2018 we are striving, as a team, to provide world class customer service to all our Client Family. As a firm, we aspire to assist our Client Family with reaching and exceeding their personal financial goals. In doing so, it is necessary to meet with you at least annually to ensure your understanding and satisfaction with your accounts. If you have not yet met with Eric in the last 12 months for your account review, we will be contacting you shortly.


Eric K Peterson, CFP® Practitioner


Jessica Livingston


Vicki Stiles


Brooke Portincaso

"Investing with Integrity"™