



Eric K. Peterson, CFP®

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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."*



Jessica Livingston is our Registered Office Manager. She is a Mizzou Graduate majoring in Business Administration with an emphasis in management. She obtained her series 6 and 63 licensures in 2015. She is currently studying for the series 7. *"My objective as the office manager is to go above and beyond to fulfill our mission statement. We will provide our clients with the finest quality services available in the financial industry. We will earn the confidence and trust of our clients through our total commitment to honesty and integrity in managing every aspect of their retirement planning and investments. We will consistently demonstrate our dedication to professionalism and excellence in all that we do. We will communicate a sincere, caring attitude toward every current or prospective client and will always place our client's financial well-being above our own."*



Vicki Stiles is Executive Assistant and Operations Director. She attended University of Wisconsin, and obtained her escrow license in 2015. Vicki is also testing for the FINRA Series 7 License in 2018. She has been with Eric's office now for two 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, I assist in staff training and Eric with special projects and his day to day responsibilities."*



Brooke Portincaso is the office Receptionist and Web Designer. She is a current student at Missouri State University and is studying Business Administration. 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, Jessica, Vicki, and Brooke

"Investing with Integrity"™