



Jeff Price <tom.j.price@gmail.com>

RE: Price Tax Returns

2 messages

Jon A. Blongewicz <blongewicz@leawoodattorneys.com>

Mon, Jul 10, 2023 at 10:43 AM

To: David Kirk <dkirk121@yahoo.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "leslie@byramlaw.com" <leslie@byramlaw.com>, Michelle Burge <mburge@countslawkc.com>

Cc: "John P. Martin" <johnmartin@higdonhale.com>, "tom.j.price@gmail.com" <tom.j.price@gmail.com>

I will ask Jeff to contact Mr. Martin directly. Hopefully that will be the simplest and least expensive (ie least involvement of attorneys) way to go. Jon

Jon A. Blongewicz

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From: David Kirk [mailto:dkirk121@yahoo.com]**Sent:** Monday, July 10, 2023 10:36 AM**To:** Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; Dan C. Sanders <dsanders@kcattorneys.net>; leslie@byramlaw.com; Michelle Burge <mburge@countslawkc.com>**Cc:** John P. Martin <johnmartin@higdonhale.com>**Subject:** Fw: Price Tax Returns

Good morning.

I traded a bunch of e-mail with John Martin regarding tax returns for Mr. Price.

I did contact Edward Jones and asked them to provide me duplicate tax information for 2022. They send a link to a cumbersome website that would not provide the Trust tax information, only the IRA's, and under the circumstances, and knowing that I do not have any other tax reporting information, I asked Mr. Martin if he minded working with Jeff Price as he has in past years. He had no objection.

If Jeff Price doesn't want to contact Mr. Martin directly, that is fine with me, but I will need the tax information to prepare the 2022 taxes, Federal and State, and information on the home sale, and information for the preparation of a gift tax return.

Someone will need to advise me on how to proceed.

Thank you.

David C. Kirk
8000 Foster
Overland Park, KS 66204

Mailing:
P.O. Box 13304
Overland Park, KS 66282
913 940-7600
Fax: 913 642-5860
E-Mail: dkirk121@yahoo.com

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----- Forwarded Message -----

From: John P. Martin <johnmartin@higdonhale.com>

To: David Kirk <dkirk121@yahoo.com>

Sent: Monday, July 10, 2023 at 09:53:01 AM CDT

Subject: RE: Price Tax Returns

David

I have not received anything further in regards to the tax returns or the information for the home sale or gifts made –

Thank you for checking –

John

John Martin, C.P.A. | President

Higdon & Hale

higdonhale.com

Shanda Shoaf | Assistant

<mailto:shanda@higdonhale.com>

Higdon & Hale C.P.A.'s P.C.

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During the busy tax time please do not hesitate to call or text if I am unable to respond in a reasonable amount of time. A reminder is always welcomed.

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Any accounting, business or tax advice contained in this communication, including attachments and enclosures, is not intended as a thorough, in-depth analysis of specific issues, nor a substitute for a formal opinion, nor is it sufficient to avoid tax-related penalties. If desired, Higdon and Hale would be pleased to perform the requisite research and provide you with a detailed written analysis. Such an engagement may be the subject of

a separate engagement letter that would define the scope and limits of the desired consultation services.

From: David Kirk <dkirk121@yahoo.com>
Sent: Monday, July 10, 2023 9:51 AM
To: John P. Martin <johnmartin@higdonhale.com>
Subject: Price Tax Returns

Good morning.

Did you get what you needed from Jeff Price?

David C. Kirk
8000 Foster
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Dan C. Sanders <dsanders@kcattorneys.net>
To: Jeff Price <tom.j.price@gmail.com>

Mon, Jul 10, 2023 at 3:05 PM

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