



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

FW: Tom Price 2022 Income tax return

6 messages

Jon A. Blongewicz <blongewicz@leawoodattorneys.com>

Fri, Jun 30, 2023 at 8:22 AM

To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>

Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>

Jeff: do you have any information on 2022 medical or charitable deductions for Tom??? Thanks, Jon

Jon A. Blongewicz

Jon A. Blongewicz, Attorney at Law, P.A.

10990 Quivira Road, Suite 200

Overland Park, KS 66210

913-335-1399

913-491-6398 fax

blongewicz@leawoodattorneys.com

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From: David Kirk [mailto:dkirk121@yahoo.com]**Sent:** Friday, June 30, 2023 8:20 AM**To:** Jon A. Blongewicz <blongewicz@leawoodattorneys.com>**Cc:** John P. Martin <johnmartin@higdonhale.com>**Subject:** Fw: Tom Price 2022 Income tax return

Good morning.

Mr. Martin will be happy to do the tax returns. Can you and Mr. Price forward any medical and charitable deduction information to me or to Mr. Martin?

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: dkirk121@yahoo.com <dkirk121@yahoo.com>

Sent: Thursday, June 29, 2023 at 08:03:14 PM CDT

Subject: Tom Price 2022 Income tax return

David

Thank you for reaching out today – I appreciate it very much.

I pulled my file and find that we did an extension but I do not have any documents to prepare the 2022 return –

I will need the 1099B/Div from Edward Jones

I will need the 1099R from Edward Jones

Any charitable contributions?

Medical Expenses?

These are the items reported on the 2021 return –

Please call with any questions –

Thank you

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.

[6310 Lamar Ave. Ste. 110](#)

[Overland Park, KS 66202](#)

913.831.7000 (Office)

913.754.1350 (Fax)

816.392.1335 (Cell)

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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Jon A. Blongewicz <blongewicz@leawoodattorneys.com>
To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>

Fri, Jun 30, 2023 at 8:58 AM

Was the house sale in 2022? Can you provide details for gift tax return. Exact sale proceeds , amount of gifts etc. ??
Jon

Jon A. Blongewicz

Jon A. Blongewicz, Attorney at Law, P.A.

10990 Quivira Road, Suite 200

Overland Park, KS 66210

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From: David Kirk [mailto:dkirk121@yahoo.com]
Sent: Friday, June 30, 2023 8:28 AM
To: John P. Martin <johnmartin@higdonhale.com>
Cc: Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; Michelle Burge <mburge@countslawkc.com>; Dan C. Sanders <dsanders@kcattorneys.net>; leslie@byramlaw.com
Subject: Re: Tom Price 2022 Income tax return

Jon:

I had heard that Mr. Price sold his home and made large cash gifts to his children. He needs to file a Gift Tax Return.

Mr. Martin knows nothing about it.

Please provide information for the Gift Tax Return at your earliest convenience.

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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On Friday, June 30, 2023 at 08:23:25 AM CDT, John P. Martin <johnmartin@higdonhale.com> wrote:

David

I was not aware of that and we did not prepare any gift tax returns – we will need information on the home sale and the amount of gifts to the children as well – thank you for letting me know this information –

I appreciate your help

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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From: David Kirk <dkirk121@yahoo.com>

Sent: Friday, June 30, 2023 8:22 AM

To: John P. Martin <johnmartin@higdonhale.com>
Subject: Re: Tom Price 2022 Income tax return

Good morning.

Thank you for getting right on it.

Mr. Price sold his home and made large cash gifts to his children. This was in the last year or two. Did you prepare a gift tax return for him?

[Quoted text hidden]

[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com>
To: "Jon A. Blongewicz" <blongewicz@leawoodattorneys.com>

Fri, Jun 30, 2023 at 10:30 AM

There are none

Sent from my iPhone

On Jun 30, 2023, at 8:58 AM, Jon A. Blongewicz <blongewicz@leawoodattorneys.com> wrote:

[Quoted text hidden]

Jon A. Blongewicz <blongewicz@leawoodattorneys.com>
To: Jeff Price <tom.j.price@gmail.com>

Fri, Jun 30, 2023 at 10:40 AM

Sorry. I do not understand your answer. There are none what? Jon

Jon A. Blongewicz

Jon A. Blongewicz, Attorney at Law, P.A.

[10990 Quivira Road, Suite 200](#)

[Overland Park, KS 66210](#)

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From: Jeff Price [mailto:tom.j.price@gmail.com]
Sent: Friday, June 30, 2023 10:31 AM
To: Jon A. Blongewicz <blongewicz@leawoodattorneys.com>

[Quoted text hidden]

[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com>
To: "Jon A. Blongewicz" <blongewicz@leawoodattorneys.com>

Fri, Jun 30, 2023 at 11:25 AM

Would it be easier if David took the lead on this and scheduled a meeting with John and I?

[Quoted text hidden]

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Jon A. Blongewicz <blongewicz@leawoodattorneys.com>
To: Jeff Price <tom.j.price@gmail.com>

Fri, Jun 30, 2023 at 11:28 AM

Absolutely. Take me out of it. You have my permission to communicate directly with David and tax preparer or whomever. Jon

[Quoted text hidden]