



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

FW: Thos Price

1 message

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

Tue, Sep 5, 2023 at 1:06 PM

Dan C. Sanders

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From: John P. Martin <johnmartin@higdonhale.com>
Sent: Monday, September 4, 2023 3:28 PM
To: David Kirk <dkirk121@yahoo.com>
Cc: leslie@byramlaw.com; Dan C. Sanders <dsanders@kcattorneys.net>; Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; Michelle Burge <mburge@countslawkc.com>
Subject: RE: Thos Price

Thank you!

John Martin, C.P.A. | President

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Shanda Shoaf | Assistant

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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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From: David Kirk <dkirk121@yahoo.com>
Sent: Monday, September 4, 2023 12:13 PM
To: John P. Martin <johnmartin@higdonhale.com>
Cc: leslie@byramlaw.com; Dan C. Sanders <dsanders@kcattorneys.net>; Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; Michelle Burge <mburge@countslawkc.com>
Subject: Re: Thos Price

I asked for Edward Jones to send me statements that cover back to my appointment on 10/11/22. It took them months to figure out that I should be getting statements but I think I can get those and we won't have a wild guess on the 2023 withholding.

Thank you. Dk

Sent from my iPhone

On Sep 4, 2023, at 11:20 AM, John P. Martin <johnmartin@higdonhale.com> wrote:

Good morning –

For 2022 :

I have the 1099R for so I know how much income and withholdings have been paid in for that income. I can prepare an estimate based on 2021 tax liability – for 2022 and then assume the same for 2023 – and prepare vouchers.

Are we able to get any info from Edward D Jones and what he has taken from his IRA in 2023 and withholdings as that would be separate from the trust? That would be helpful if possible.

I can work up a fee for services to date and prior services.

Another thought –if someone has a power of attorney for him as individual, we could prepare an IRS power of attorney and send to IRS and request an income transcript for 2022 which would list income reported under his social security number. Since this is a living trust still reporting under his ss# -the income would be posted to his IRS account under his ss#.

Reviewing 2021 – he had a federal overpayment so if income was comparable, he would be overpaid for 2022 – for Kansas he owed about \$600 for 2021 so he would owe about the same for 2022 – I can prepare that voucher and then 1 for 2023 as well –

The amount taken from IRA for 2023 with federal and Kansas withholdings would be very helpful - if that has been done would be very helpful.

Thank you

John

John Martin, C.P.A. | President

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From: David Kirk <dkirk121@yahoo.com>
Sent: Monday, September 4, 2023 10:57 AM
To: John P. Martin <johnmartin@higdonhale.com>
Cc: leslie@byramlaw.com; Dan C. Sanders <dsanders@kcattorneys.net>; Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; Michelle Burge <mburge@countslawkc.com>
Subject: Thos Price

Good morning.

I have hit the wall with Edward Jones on the consolidated 1099 for Mr Price's Trust because of my lack of authority over the Trust and the pending litigation.

Unless you have a better idea, I thought I would ask if you have any insight into what kind of withholding I might make so that Mr. Price would be in safe harbor for his individual tax returns for tax year 2022 and 2023.

My Temporary authority will not allow me to make those payments without a Court Order. I would like to have your bill for the outstanding fees for the 2021 tax preparation, the gift tax return for 2022 if you have enough information to prepare it, and whatever charges have been incurred to date on the 2023 tax prep.

I am available to discuss Tuesday, Wednesday or Thursday morning.

Thank you.

David C. Kirk
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