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March 6, 2023

Ms. Michelle Burge  
The Counts Law Firm, LLC  
4200 Somerset Drive, Suite 200  
Prairie Village, KS 66208

Mr. Jon Blongewicz  
Jon Blongewicz Attorney at Law, PA  
10990 Quivira Road, #200  
Overland Park, KS 66210

Mr. Dan C. Sanders  
Monaco Sanders et al  
8700 State Line Road, Ste. 110  
Leawood, KS 66206

Ms. Leslie Byram  
Leslie C. Byram, PA  
9401 Nall Avenue, Suite 100  
Prairie Village, KS 66207

Re: In the Matter of the Guardian and Conservatorship of Thomas J. Price  
In the District Court of Johnson County, Kansas  
Case No. 22GC00224

Ladies and Gentlemen:

I am in receipt of the Agreed Order Transferring Assets of Proposed Ward and I have begun the process of transferring the existing investment accounts at Edward Jones to Creative Planning. I suspended the process because I became concerned about the proposed Ward and Conservatee's understanding of the expense involved and the effect of this transfer Order.

Creative Planning has created a conduit trust and the principle asset under their administration will be tax advantaged retirement accounts for the benefit of Thomas J. Price. The current beneficiary designation at Edward Jones is 50% shares to "TR of Thomas & Helen Price, Jr. FBO Teresa J. Kuhn and TR of Thomas & Helen Price, Jr. FBO Thomas Price, III". The docusign enrollment that I have been asked to complete names the "Thomas J. Price & Helen Price Trust" as the beneficiary on the accounts.

All I am being asked to do is execute the documents to effect the transfer. The issue is that I am generally aware that Mr. Price divided the proceeds from the sale of his home between his children sparing them the administrative expenses of putting those proceeds in Trust. He is also, by his attorney, contesting a fee request pending in the Guardian and Conservatorship. In every way, Mr. Price is showing me that he is fee averse. I am not

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sure that he understands the consequences of the transfer that I am being asked to make. I have not reviewed the Estate planning. I have no good sense of the timeline for the Estate planning and changes to it, if any.

On March 3, 2023, I had Zoom call with Dan Sanders, Jon Blongewicz and Jeff Price. I have spoken with Michelle Burge by phone. I have not spoken with Leslie Byram. I have been assured by Jeff Price that Thomas Price absolutely investigated many alternative estate planning attorneys and trust companies, that he was well informed, that the Creative Planning team came well recommended to him, and that there is no doubt that he understood and understands the effect of transferring the investment accounts to Creative Planning.

I am planning to complete the account transfer in accordance with the current Order, unless any or all of you wish to revisit the proposed transfer of accounts. I am planning to complete the docusign transfer to Creative Planning as soon as possible after March 17<sup>th</sup>. I will request that Creative Planning pay the recurring monthly rent and fees at Benton House beginning April 1, 2023 and continuing monthly thereafter. My Temporary Conservatorship authority is current until March 28<sup>th</sup>.

Thank you for your consideration.

Very truly yours,



David C. Kirk

DCK