

Relationship Activities And Notes

All figures effective as of print date

Price, Megan

Upcoming Activities

List sorted by Activity Date

Activity Date	Type	Name	Description	Need	Maturity Date	Amount
*** No upcoming activities exist for this contact. ***						

Completed Activities from January 01, 2021 thru April 06, 2023

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
03/29/23	Note	03/29/23	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Email: VOC - Client Relationship Survey Email --- Voice of Client Survey letter emailed 3/29/233			
03/13/23	Note	03/13/23	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Email: Daily Market Snapshot - BOA --- Daily Market Snapshot re Silicon Valley Bank failure emailed 3/13/23			
03/03/23	Note	03/03/23	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.cc@gmail.com			
02/03/23	Note	02/03/23	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.cc@gmail.com			
01/10/23	Note	01/10/23	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.cc@gmail.com			
12/06/22	Note	12/06/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.cc@gmail.com			
11/05/22	Note	11/05/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to meganprice.cc@gmail.com			
10/19/22	Note	10/19/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Email: FA/BOA Out of Office --- Email baby announcement 10/19/22			

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Completed Activities from January 01, 2021 thru April 06, 2023

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
10/08/22	Note	10/08/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) email to meganprice.cc@gmail.com			
09/19/22	Note	09/19/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Letter: Forbes Next-Gen Ranking 2022 --- WordPower: Top Next-Gen Best in State 2022	Administrative		
09/19/22	Note	09/19/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Letter: Forbes - Best-in-State Wealth Adv 2022 --- WordPower: Top Next Gen Wealth Advisors-Best in State 2022	Administrative		
09/09/22	Note	09/09/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective Newsletter (ST) email to meganprice.cc@gmail.com			
09/07/22	ToDo	09/07/22	PRICE, MEGAN, TOM Joint Acco 92523145	Once PG trade settles (place 9/1 amrkt, should settle 9/7), send exact proceeds to bank on file Once AFCXX trade settles (place 9/1 amrkt, should settle 9/6), send exact proceeds to bank on file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her account. She wanted to have some of cash sent to bank on file. Once trades settle, send proceeds to bank. She wants to leave \$250 in cash in the account.			
09/07/22	ToDo	09/07/22	PRICE, MEGAN, TOM Joint Acco 92523145	Last transfer was made. Left \$250 in account. Once AFCXX trade settles (place 9/1 amrkt, should settle 9/6), send exact proceeds to bank on file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her account. She wanted to have some of cash sent to bank on file. Once trades settle, send proceeds to bank. She wants to leave \$250 in cash in the account.			

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09/06/22	Note	09/06/22	PRICE, MEGAN, TOM Joint Acco 92523145	Home Office Correspondence: Activity in Your Account (NC_DS)			
09/01/22	Call	09/01/22	PRICE, MEGAN, TOM Joint Acco 92523145	Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her account. She wanted to have some of cash sent to bank on file. Once trades settle, send proceeds to bank. She wants to leave \$250 in cash in the account.			
09/01/22	Call	09/01/22	PRICE, MEGAN, TOM Joint Acco 92523145	Thu, 01-Sep-2022 4:03pm (FA, BD): Talked to Megan and her aunt Terri (with Megan's permission). Rediscussed items from Tuesday: After talking to Dan (FSD), I let Megan know that we are able to take instructions from her on the account (trading) and that we are able to follow her instructions for money requests (ACH already on file). Money requests in check form would be made out to both Megan and Tom. I let her know registration changes cannot be done at this time as we would require a doctor's letter to proceed. At this time, we would not be able to take any instructions from Tom until we receive a doctor's letter.			

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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
08/30/22	Call	08/30/22	PRICE, MEGAN, TOM Joint Acco 92523145	Tue, 30-Aug-2022 12:51pm (FA, BD): Talked to Megan. She was wondering what actions could be taken on account. After talking to Dan (FSD), I let Megan know that we are able to take instructions from her on the account (trading) and that we are able to follow her instructions for money requests (ACH already on file). Money requests in check form would be made out to both Megan and Tom. I let her know registration changes cannot be done at this time as we would require a doctor's letter to proceed. At this time, we would not be able to take any instructions from Tom until we receive a doctor's letter. She gave permission to add an account alert on this account for all calls to be referred to branch.			
08/26/22	Call	08/26/22	PRICE, MEGAN, TOM Joint Acco 92523145	Birthday Call: Megan 8/28			
07/09/22	Note	07/09/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Mthly-Jul/Aug) (ST) email to meganprice.cc@gmail.com			
07/01/22	Note	07/01/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Email: FA / BOA Out of Office --- Brooke out of office 7/4-7/11/22. Emailed 7/1/22			
06/04/22	Note	06/04/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.cc@gmail.com			
05/07/22	Note	05/07/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.cc@gmail.com			

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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
04/07/22	Note	04/07/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to meganprice.cc@gmail.com			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]			
03/16/22	Call	10/18/22	PRICE, MEGAN, TOM Joint Acco 92523145	6 Month Call			

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03/10/22	Note	03/10/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPress Email: Market Pulse update: Markets Wrestle with a Commodity Price Shock - Our Take on Its Impact --- Markets wrestle with commodity price shock-our take on its impact 3/10			
03/04/22	Note	03/04/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.cc@gmail.com			
02/25/22	Call	02/25/22	PRICE, MEGAN, TOM Joint Acco 92523145	11/13 sent text message. 11/12 sent email 10/30 sent email 10/1 sent email 8/3 sent email asking again for appointment. 4/23/2020 updated Trusted Contact, wants appointment for after 6:00 or after 4:00 on weekends. 3/9 texted 11/18 texted. 11/8 sent msg back that she is too busy. I suggested a webex or phone call. 10/31 texted. sent email Confirm annual review			
02/24/22	Note	02/24/22	PRICE, MEGAN, TOM Joint Acco 92523145	WordPress Email: Market Pulse update: Geopolitical tensions added to near-term uncertainty --- Weekly Market Wrap re Ukraine emailed 2/24/22			
02/04/22	Note	02/04/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.cc@gmail.com			
01/11/22	Note	01/11/22	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.cc@gmail.com			
12/04/21	Note	12/04/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.cc@gmail.com			
11/06/21	Note	11/06/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to meganprice.cc@gmail.com			

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10/08/21	Note	10/08/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) email to meganprice.cc@gmail.com			
09/04/21	Note	09/04/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Sep) (ST) email to meganprice.cc@gmail.com			
08/27/21	Call	08/27/21	PRICE, MEGAN, TOM Joint Acco 92523145	Megan's bday 8/28			
08/07/21	Note	08/07/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Aug) (ST) email to meganprice.cc@gmail.com			
07/28/21	Note	07/28/21	PRICE, MEGAN, TOM Joint Acco 92523145	WordPower Letter: Introduce BOA/BOA Retires --- BOA Julie leaving, new BOA Megan starting 7/28/21			
07/07/21	Note	07/07/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jul) (ST) email to meganprice.cc@gmail.com			
06/05/21	Note	06/05/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.cc@gmail.com			
05/08/21	Note	05/08/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.cc@gmail.com			
04/06/21	Note	04/06/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to meganprice.cc@gmail.com			
03/24/21	Note	03/24/21	PRICE, MEGAN, TOM Joint Acco 92523145	Address Verification Letter: E-Delivery Verification Letter			

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03/15/21	Call	03/12/21	PRICE, MEGAN, TOM Joint Acco 92523145	6 mo call			
03/06/21	Note	03/06/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.cc@gmail.com			
02/05/21	Note	02/05/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.cc@gmail.com			
01/14/21	Note	01/14/21	PRICE, MEGAN, TOM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.cc@gmail.com			