All figures effective as of print date

Price, Megan

TO RECEIVE TO NEED AND	g Activities				
ļ	I by Activity D	Name	Description	Need	Maturity Amount
Activity Date	-28-			1	Date
			*** No upcoming activities exist for this contact. ***		

List sorted b	by Comple							
Completion Date	Туре	Activity Date	Name		Description	Need	Maturity Date	Amount
03/29/23	Note	03/29/23	PRICE, MEGAN, 1	OM 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, 7	OM 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, 1	OM 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, 7	OM 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, 1	OM 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, T	OM Joint Acco 92523145	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.cc@gmail.com		The second secon	
11/05/22	Note	11/05/22	PRICE, MEGAN, T	OM 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, T	OM Joint Acco 92523145	WordPower Email: FA/BOA Out of Office Email baby announcement 10/19/22			

All figures effective as of print date

Price, Megan		

List sorted b	y Completic	on Date and	Time						
Completion Date	Туре	Activity Date	Name			Description	Need	Maturity Date	Amount
10/08/22	Note	10/08/22	PRICE, MEG	N, 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, MEG	N, 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, MEG	N, TOM	Joint Acco 92523145	WordPower Letter: Forbes - Best-in-State Wealth Adv 2022 W ordPower: Top Next Gen Wealth Advisors-Best in State 2022	Administrative		
09/09/22	Note	09/09/22	PRICE, MEG	N, TOM	Joint Acco 92523145	NEWSLETTER Edward Jones Perspective Newsletter (ST) email to meganprice.cc@gmail.com			
09/07/22	ToDo	09/07/22	PRICE, MEG	N, TOM	Joint Acco 92523145	Once PG trade settles (place 9/1 amrkt, should settle 9/7), se nd 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, MEG	N, TOM	Joint Acco 92523145	Last transfer was made. Left \$250 in account. Once AFCXX trad e settles (place 9/1 amrkt, should settle 9/6), send exact pro ceeds to bank on file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talk ed to Megan. She wanted to place sells in her account. She wan ted to have some of cash sent to bank on file. Once trades set tle, send proceeds to bank. She wants to leave \$250 in cash in the account.			

All figures effective as of print date

Relationship Activities And Notes

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Price, Megan	

List sorted b	y Completi	on Date and	Time							
Completion Date	Туре	Activity Date	Name				Description	Need	Maturity Date	Amount
09/06/22	Note	09/06/22	PRICE, M	IEGAN,		Joint Acco 92523145	Home Office Correspondence: Activity in Your Account (NC_DS)			
09/01/22	Call	09/01/22	PRICE, M	IEGAN.	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	Ca11	09/01/22	PRICE, M	EGAN,		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 Tuesd ay: After talking to Dan (FSD), I let Megan know that we are a ble to take instructions from her on the account (trading) and that we are able to follow her instructions for money request s (ACH already on file). Money requests in check form would be made out to both Megan and Tom. I let her know registration c hanges 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.			

All figures effective as of print date

Price, Megan	

	y Comple	tion Date and								
Completion Date	Туре	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 wo ndering 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 d one 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) e mail to meganprice.cc@gmail.com			THE REAL PROPERTY AND ADDRESS OF THE PERSON NAMED AND ADDRESS
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			

All figures effective as of print date

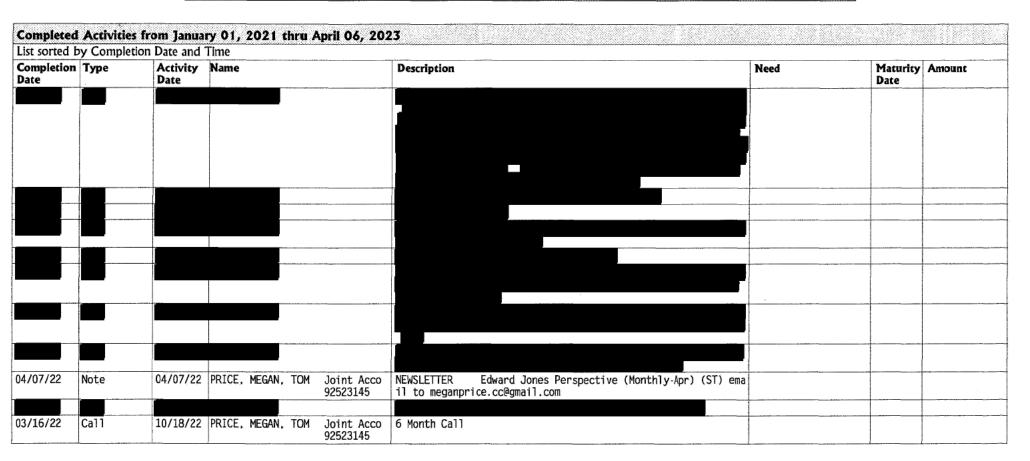
Price, Megan		

List sorted by Completion Date and Time							,			
Completion Date	Туре	Activity Date	Name				Description	Need	Maturity Date	Amount
04/27/22	Note	04/27/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	WordPower Email: Message from Edward Jones Market Pulse: Growth Concerns Overshadow Fundamentals 4/27/22			
04/21/22	Note	04/21/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	Account Verification Letter: New Account, Significant Change or Every Three Year			
04/20/22	Note	04/20/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	Home Office Correspondence: Confirming a change to your account's goal			
04/19/22	Note	04/19/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	WordPower Letter: Admin. Forms/Documents Cover Notes			
04/18/22	Cal1	04/18/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	Mon. 18-Apr-2022 12:46pm (FA, BD): Spoke to Megan. She wanted to place trades. We discussed how trades would create cap gain s.			
04/18/22	Cal1	04/18/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	Mon, 18-Apr-2022 12:36pm (FA, BD): LM for Megan to CB regardin g making trades in her account			
04/15/22	Note	04/15/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	Home Office Correspondence: Confirming your goal's Portfolio Objective			
04/15/22	Appt-Review	04/14/22	PRICE,	MEGAN,	TOM	Joint Acco 92523145	confirmed Annual Review. kn			

All figures effective as of print date

Relationship Activities And Notes

Price, Megan



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List sorted by Completion Date and Time										
Completion Date	Туре	Activity Date	Name		Description	Need	Maturity Date	Amount		
03/10/22	Note	te 03/10/22	PRICE, MEGAN, TOM	Joint Acco 92523145	WordPower Email: Market Pulse update: Markets Wrestle with a ommodity Price Shock - Our Take on Its Impact Markets writle 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 p hone call. 10/31 texted. sent email Confirm annual review					
02/24/22	Note	02/24/22	PRICE, MEGAN, TOM	Joint Acco 92523145	WordPower Email: Market Pulse update: Geopolitical tensions ad d to near-term uncertainty Weekly Market Wrap re Ukraine e mailed 2/24/22		4			
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					

All figures effective as of print date

Price, Megan	

List sorted b	y Completion	Date and Time								
Completion Date	Туре	Activity Date	Name				Description	Need	Maturity Date	Amount
10/08/21	Note	te 10/08/21	PRICE,	MEGAN.		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) ema il to meganprice.cc@gmail.com	Name of the Control o		
09/04/21	Note	09/04/21	PRICE,	MEGAN,		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Sep) (ST) email to meganprice.cc@gmail.com			
08/27/21	Call	08/27/21	PRICE,	MEGAN,		oint Acco 2523145	Megan's bday 8/28			
08/07/21	Note	08/07/21	PRICE.	MEGAN.		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Aug) (ST) email to meganprice.cc@gmail.com			
07/28/21	Note	07/28/21	PRICE,	MEGAN,		oint Acco 2523145	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,		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Jul) (ST) email to meganprice.cc@gmail.com			
06/05/21	Note	06/05/21	PRICE,	MEGAN,		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.cc@gmail.com			
05/08/21	Note	05/08/21	PRICE.	MEGAN,		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.cc@gmail.com			
04/06/21	Note	04/06/21	PRICE,	MEGAN,		oint Acco 2523145	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to meganprice.cc@gmail.com			
03/24/21	Note	03/24/21	PRICE,	MEGAN,		oint Acco 2523145	Address Verification Letter: E-Delivery Verification Letter			

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Relationship Activities And Notes

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List sorted b	y Comple	tion Date and	Time					
Completion Date	Туре	Activity Date	Name		Description	Need	Maturity Date	Amount
03/15/21	Call	03/12/21	PRICE, MEGAN, TOM	Joint Acco 92523145	6 mo call			
3/06/21	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			

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