

All figures effective as of print date

### Contact Activities and Notes

<p><b>PRICE JR, TOM ROTH (O)</b>                  FBO THOMAS J PRICE JR RTH                  Roth IRA Account                  92696230                  EDWARD D JONES &amp; CO CUSTODIAN                  3916 N POTSDAM AVE UNIT 11869                  SIOUX FALLS, SD 57104-7048</p>	<p>(913)390-0674 (H) (P)                  No phone number given (W)                  No alternate phone number given</p>	<p>Call Preference: Morning</p>
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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	Description	Need	Maturity Date	Amount
08/18/22	Note	08/18/22	Account Verification Letter: New Account, Significant Change or Every Three Year			
05/20/22	Note	05/20/22	Address Verification Letter: Address / Name Change			
10/12/21	CBK	10/12/21	Reached out via email in regards to moving his father from his granddaughters account. Can you please call him Tue, 12-Oct-2021 8:53am (BDA, MS):			
10/08/21	Call	10/08/21	Send zoom link for Tom Price annual review and email both Tom and Jeff for zoom invite.			
10/08/21	ToDo	10/11/21	Send zoom link for appointment at 9:30			