



Jeff Price &lt;tom.j.price@gmail.com&gt;

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**Creative Planning - Estate Planning**

1 message

**Maggie Fisher** <maggie.fisher@creativeplanning.com>

Mon, Oct 18, 2021 at 9:57 AM

To: "tom.j.price@gmail.com" &lt;tom.j.price@gmail.com&gt;, "warwgn@outlook.com" &lt;warwgn@outlook.com&gt;

Cc: Eric Pfanstiel &lt;eric.pfanstiel@creativeplanning.com&gt;

Jeff and Tom,

Eric said that he talked to Joe Morris. "Apparently, Tom used his limited power of appointment as executor of wife's estate to move the P&G stock from his trust to hers and get a step up. No estate tax return was filed. If Tom left the stock in her trust, there is probably no problem. If he has moved her assets to his trust, there may be some planning to do." Please let us know what he did with the stock and where it sits now. Also, if you could provide the total value of Tom's current estate, we can make some decisions about how to plan for the future.

Thank you!

Maggie

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