



Jeff Price <tom.j.price@gmail.com>

Creative Planning - Estate Planning

2 messages

Maggie Fisher <maggie.fisher@creativeplanning.com>

Wed, Sep 23, 2020 at 9:22 AM

To: "warwgn@outlook.com" <warwgn@outlook.com>, "Tom.j.price@gmail.com" <Tom.j.price@gmail.com>

Cc: Staci Holcom <staci.holcom@creativeplanning.com>

Tom,

Thank you for speaking with me today. Attached please find your Estate Planning Memo. Please review it and make sure I have your wishes captured appropriately. Also check for name spellings and addresses. In addition, I have sent your Engagement letter through DocuSign, which I will need you to sign and return when you are ready for us to complete your estate plan. Feel free to ask any questions!

Thank you,


Maggie

Maggie Fisher, JD
Attorney

maggie.fisher@creativeplanning.com
Direct: 913.356.5580 | Fax: 913.338.4507
www.creativeplanning.com

5454 W 110th Street, Overland Park, KS 66211

Please note that email communication, like most forms of communication, is not a secure method of communication and may be intercepted. Also, depending on your employer's policies, it is possible that emails sent via a work email address have no privacy protection and may not be protected under the attorney-client privilege. I am communicating to you via email because you have consented to receive communications via this medium. If you change your mind and want future communications to be sent in a different fashion, please let me know immediately. This e-mail, including any attachments, may contain material that is confidential and may be protected by the attorney-client privilege, attorney work product doctrine or other legal rules. Any review, reliance or distribution by someone other than the intended recipient is strictly prohibited. If you are not the intended recipient, please immediately contact the sender and delete all copies.

 **Client EP Memo--9 23 2020.docx**
19K

Maggie Fisher <maggie.fisher@creativeplanning.com>
To: Tom Price <warwgn@outlook.com>, "Tom.j.price@gmail.com" <Tom.j.price@gmail.com>
Cc: Staci Holcom <staci.holcom@creativeplanning.com>

Wed, Sep 23, 2020 at 11:15 AM

Yes – that is correct. That is the memo we use to draft so sometimes the notes on there are to myself!

Maggie Fisher, JD
Attorney

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From: Tom Price <warwgn@outlook.com>
Sent: Wednesday, September 23, 2020 10:33 AM
To: Maggie Fisher <maggie.fisher@creativeplanning.com>; Tom.j.price@gmail.com
Cc: Staci Holcom <staci.holcom@creativeplanning.com>
Subject: Re: Creative Planning - Estate Planning

Maggie,

My son and I have read and confirmed that the information is correct. You mentioned that CCB is in several spots within the document. I am assuming that you will change the document to completely remove CCB, is my assumption correct?

Thank you,

Thomas J. Price JR

[Quoted text hidden]