



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

Creative Planning - Helen Price (deceased)

4 messages

Maggie Fisher <maggie.fisher@creativeplanning.com>

Tue, Oct 12, 2021 at 3:40 PM

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

Cc: Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>, Sally Melms <sally.melms@creativeplanning.com>

Tom and Jeff,

Thank you for your phone call as to whether or not we filed for portability for Helen. I am sending you to our Probate and Trust Administration team to check.

Eric - Tom Price's wife Helen died in 2017. I did some amendments to his trust last year. Thanks for your help.

Maggie

Maggie Fisher, JD

Attorney

maggie.fisher@creativeplanning.com

Direct: 913.356.5580 | Fax: 913.338.4507

www.creativeplanning.com5454 W 110th Street, Overland Park, KS 66211[SCHEDULE A MEETING >](#)

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the intended recipient is strictly prohibited. If you are not the intended recipient, please immediately contact the sender and delete all copies.

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

Tue, Oct 12, 2021 at 4:10 PM

To: Maggie Fisher <maggie.fisher@creativeplanning.com>

Cc: warwgn@outlook.com, Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>, Sally Melms <sally.melms@creativeplanning.com>

Thank you

Sent from my iPhone

On Oct 12, 2021, at 3:40 PM, Maggie Fisher <maggie.fisher@creativeplanning.com> wrote:

Tom and Jeff,

Thank you for your phone call as to whether or not we filed for portability for Helen. I am sending you to our Probate and Trust Administration team to check.

Eric - Tom Price's wife Helen died in 2017. I did some amendments to his trust last year. Thanks for your help.

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5454 W 110th Street, Overland Park, KS 66211

<image001.png>

<image002.png>

[Quoted text hidden]

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

Fri, Oct 15, 2021 at 11:54 AM

To: Maggie Fisher <maggie.fisher@creativeplanning.com>

Cc: Tom Price <warwgn@outlook.com>, Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>, Sally Melms <sally.melms@creativeplanning.com>

Just trying to close or update my to do's for the week, what is the status on this?

Thank you,
Jeff Price

[Quoted text hidden]

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Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>

Fri, Oct 15, 2021 at 12:36 PM

To: Jeff Price <tom.j.price@gmail.com>, Maggie Fisher <maggie.fisher@creativeplanning.com>

Cc: Tom Price <warwgn@outlook.com>, Sally Melms <sally.melms@creativeplanning.com>

I am playing phone tag with Joe Morris (since retired) to find out more about this estate. Will let you know when I find anything out.

Eric

Eric Pfanstiel, JD
Attorney

eric.pfanstiel@creativeplanning.com
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From: Jeff Price <tom.j.price@gmail.com>

Sent: Friday, October 15, 2021 11:55 AM

To: Maggie Fisher <maggie.fisher@creativeplanning.com>

Cc: Tom Price <warwgn@outlook.com>; Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>; Sally Melms

9/19/23, 11:43 AM

Gmail - Creative Planning - Helen Price (deceased)

[<sally.melms@creativeplanning.com>](mailto:sally.melms@creativeplanning.com)

Subject: Re: Creative Planning - Helen Price (deceased)

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