



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

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**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" &lt;warwgn@outlook.com&gt;, "Tom.j.price@gmail.com" &lt;Tom.j.price@gmail.com&gt;

Cc: Eric Pfanstiel &lt;eric.pfanstiel@creativeplanning.com&gt;, Sally Melms &lt;sally.melms@creativeplanning.com&gt;

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.com](http://www.creativeplanning.com)5454 W 110<sup>th</sup> 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.

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

Tue, Oct 12, 2021 at 4:10 PM

To: Maggie Fisher &lt;maggie.fisher@creativeplanning.com&gt;

Cc: warwgn@outlook.com, Eric Pfanstiel &lt;eric.pfanstiel@creativeplanning.com&gt;, Sally Melms &lt;sally.melms@creativeplanning.com&gt;

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 110<sup>th</sup> Street, Overland Park, KS 66211

<image001.png>

<image002.png>

[Quoted text hidden]

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

Fri, Oct 15, 2021 at 11:54 AM

To: Maggie Fisher &lt;maggie.fisher@creativeplanning.com&gt;

Cc: Tom Price &lt;warwgn@outlook.com&gt;, Eric Pfanstiel &lt;eric.pfanstiel@creativeplanning.com&gt;, Sally Melms &lt;sally.melms@creativeplanning.com&gt;

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  
Direct: 913.303.3094 | Fax: 913.754.1363  
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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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