



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

Creative Planning - Tom's accounts

17 messages

Adam Hoopes <adam.hoopes@creativeplanning.com> Fri, Sep 30, 2022 at 8:56 AM
To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>, "warwgn@outlook.com" <warwgn@outlook.com>
Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

Tom & Jeff,

We are holding off on submitting the transfer requests. Please let me know when you hear that the Edward Jones has removed the hold/block on the accounts.

Adam

Adam Hoopes, CFP®
Partner / Private Wealth Manager

adam.hoopes@creativeplanning.com
Direct: 913.356.5513 | Fax: 913.338.4507
www.creativeplanning.com

5454 W 110th Street, Overland Park, KS 66211



SEND FILES SECURELY >

Jeff Price <tom.j.price@gmail.com> Fri, Sep 30, 2022 at 9:42 AM
To: Adam Hoopes <adam.hoopes@creativeplanning.com>
Cc: warwgn@outlook.com, Maggie Fisher <maggie.fisher@creativeplanning.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

We will.

I know I have asked this before, but should I give them the new Financial POA? This would eliminate them from talking to Terri.

Sent from my iPhone

On Sep 30, 2022, at 8:56 AM, Adam Hoopes <adam.hoopes@creativeplanning.com> wrote:

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Fri, Sep 30, 2022 at 9:46 AM

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

Cc: "warwgn@outlook.com" <warwgn@outlook.com>, Maggie Fisher <maggie.fisher@creativeplanning.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

I don't have an opinion – I'll let Maggie decide on this.

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Subject: Re: Creative Planning - Tom's accounts

NOTICE! -This message is from an EXTERNAL SENDER. Use caution with links and attachments.

[Quoted text hidden]

Maggie Fisher <maggie.fisher@creativeplanning.com> Fri, Sep 30, 2022 at 3:26 PM
To: Jeff Price <tom.j.price@gmail.com>, Adam Hoopes <adam.hoopes@creativeplanning.com>
Cc: "warwgn@outlook.com" <warwgn@outlook.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

I don't think they will accept it until the KS APS case is closed.

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Attorney

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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.

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Subject: Re: Creative Planning - Tom's accounts

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We will.

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Adam Hoopes <adam.hoopes@creativeplanning.com> Fri, Oct 7, 2022 at 1:04 PM
To: Maggie Fisher <maggie.fisher@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>
Cc: "warwgn@outlook.com" <warwgn@outlook.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

Jeff – Have you heard anything more here?

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Adam Hoopes <adam.hoopes@creativeplanning.com>

Fri, Oct 7, 2022 at 1:21 PM

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Jeff – Have you heard any more about the block being removed from Tom’s accounts at Edward Jones?

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To: Adam Hoopes <adam.hoopes@creativeplanning.com>
Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

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Thanks,
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5 attachments



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Sun, Oct 16, 2022 at 11:16 PM

Jeff – I reached out to an attorney in our office that may know of someone that you can hire outside of Creative Planning.

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[Quoted text hidden]

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

Mon, Oct 17, 2022 at 2:27 AM

To: Adam Hoopes <adam.hoopes@creativeplanning.com>

Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

Thank you Adam,

Maggie, I know this is short notice, do you have the FPOW prior to 2018? If so can I get a copy? If not what would it take to create a new FPOA list a third party as a temporary FPOA?

Thanks Jeff

Sent from my iPhone

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7 attachments



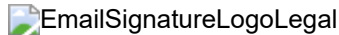
Maggie Fisher <maggie.fisher@creativeplanning.com> Mon, Oct 17, 2022 at 7:28 AM
To: Adam Hoopes <adam.hoopes@creativeplanning.com>
Cc: Jeff Price <tom.j.price@gmail.com>, Susan Wickoren <susan.wickoren@creativeplanning.com>

So did I. We will help you find someone.

Mary Margaret "Maggie" Fisher
Attorney

maggie.fisher@creativeplanning.com
Direct: 913.356.5580 | Main/Scheduling: 913.327.9455 | Fax: 913.754.1363
www.creativeplanninglegal.com

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12 attachments

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9K[SCHEDULE A MEETING >](#)**image003.png**
6K[SEND FILES SECURELY >](#)**image005.png**
7K

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

Mon, Oct 17, 2022 at 8:48 AM

Maggie,

I was not thinking too clearly at 2AM. Please disregard my ask for a temporary FPOA.

[Quoted text hidden]

Adam Hoopes <adam.hoopes@creativeplanning.com>
To: Jeff Price <tom.j.price@gmail.com>
Cc: Susan Wickoren <susan.wickoren@creativeplanning.com>, Maggie Fisher <maggie.fisher@creativeplanning.com>, Daniel Luppino <drluppino@lewisricekc.com>

Mon, Oct 17, 2022 at 9:06 AM

Jeff – Copied is Danny Luppino. He may be able to help you.

I'd reach out to Danny as soon as you can to get a strategy planned out before the emergency hearing on Wednesday.

Adam

Adam Hoopes, CFP®
Partner / Private Wealth Manager

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[Quoted text hidden]

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

Mon, Oct 17, 2022 at 9:36 AM

To: Adam Hoopes <adam.hoopes@creativeplanning.com>

Cc: Susan Wickoren <susan.wickoren@creativeplanning.com>, Maggie Fisher <maggie.fisher@creativeplanning.com>,
Daniel Luppino <drluppino@lewisricekc.com>

Danny,

Please call me anytime at 224-542-9588.

Adam, thank you so much

[Quoted text hidden]

[Quoted text hidden]

Maggie Fisher <maggie.fisher@creativeplanning.com>

Mon, Oct 17, 2022 at 9:53 AM

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

Understood – keep us updated!

Maggie Fisher, JD

Attorney

maggie.fisher@creativeplanning.com

Direct: 913.356.5580 | Fax: 913.338.4507

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This is the previous FPA.

Maggie Fisher, JD
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