



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

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**Fwd: Creative Planning**

2 messages

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**Dan C. Sanders** <dsanders@kcattorneys.net>  
To: Jeff Price <tom.j.price@gmail.com>

Wed, Feb 15, 2023 at 2:01 PM

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**From:** David Kirk <dkirk121@yahoo.com>  
**Sent:** Wednesday, February 15, 2023 1:45:49 PM  
**To:** Dan C. Sanders <dsanders@kcattorneys.net>; Michelle Burge <mburge@countslawkc.com>; Jon A. Blongewicz <blongewicz@leawoodattorneys.com>; [leslie@byramlaw.com](mailto:leslie@byramlaw.com) <[leslie@byramlaw.com](mailto:leslie@byramlaw.com)>  
**Subject:** Creative Planning

I am trying to complete the docusign transfer to Schwab from Edward Jones.

In the IRA account they are making the Living Trust the beneficiary of the IRA account.

It seems to me that the beneficiaries were the two children in equal shares, and that should be preserved.

I stopped signing off until I hear back.

David C. Kirk  
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**Dan C. Sanders** <dsanders@kcattorneys.net>  
To: David Kirk <dkirk121@yahoo.com>

Wed, Feb 15, 2023 at 2:51 PM

David:

Maggie Fisher is the one to call. I have never spoken with her but her contact info is:

**Maggie Fisher, JD**  
Attorney

maggie.fisher@creativeplanning.com  
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