



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

Creative Planning Legal - Thomas Price, Jr.

10 messages

Staci Holcom <staci.holcom@creativeplanning.com>

Wed, Sep 30, 2020 at 9:52 AM

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

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

Dear Jeff and Terri,

It was nice to meet your father and both of you (in person and via phone) today.

I thought it might be helpful to have copies of all of his signed documents in one location, so I have created a file that contains the 2 documents signed today, and also the previously signed documents (including, the Trust, Will, Financial Power of Attorney and Health Care Power of Attorney. If you would like electronic copies of your signed documents, you can use the following secure link to download them. A password is required, which I will email separately:

To download copies: <https://creativeplanning.egnyte.com/fl/vKFaG7o7r3>

Please don't hesitate to contact Maggie or me if you should have any questions or if we can be of any further assistance.

Staci

Staci Holcom
Paralegal

staci.holcom@creativeplanning.com
Direct: 913.742.7221 | Fax: 913.754.1363
www.creativeplanninglegal.com

5454 W 110th Street, Overland Park, KS 66211



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

Fri, Oct 9, 2020 at 8:35 AM

Staci,

I want to apologize for not seeing this email before now, and confirming that I had received it. I was able to access the documents.

How long will I have access to these documents?

Thank you,
Jeff Price

[Quoted text hidden]

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Staci Holcom <staci.holcom@creativeplanning.com>
To: Jeff Price <tom.j.price@gmail.com>

Fri, Oct 9, 2020 at 8:41 AM

Good morning, Jeff.

The current link will expire October 30, 2020. But I can always reactivate the link or send a new one after it expires.

Staci

Staci Holcom
Paralegal

staci.holcom@creativeplanning.com
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[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com>
To: Staci Holcom <staci.holcom@creativeplanning.com>

Fri, Oct 9, 2020 at 8:54 AM

Staci,

I do not know what I was thinking, I have not had enough to drink this morning. I was able to down load the files, so I do not need access to the file any longer

Thank you,
Jeff Price

On Wed, Sep 30, 2020 at 9:52 AM Staci Holcom <staci.holcom@creativeplanning.com> wrote:

[Quoted text hidden]

[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com>
To: Staci Holcom <staci.holcom@creativeplanning.com>

Fri, Oct 9, 2020 at 8:56 AM

I need to clarify, I have not had enough coffee this morning.

[Quoted text hidden]

Staci Holcom <staci.holcom@creativeplanning.com>
To: Jeff Price <tom.j.price@gmail.com>

Fri, Oct 9, 2020 at 8:58 AM

It's Friday. No judgments here.

Staci Holcom
Paralegal

staci.holcom@creativeplanning.com
Direct: 913.742.7221 | Fax: 913.754.1363
www.creativeplanninglegal.com

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From: Jeff Price [mailto:tom.j.price@gmail.com]
Sent: Friday, October 9, 2020 8:56 AM
To: Staci Holcom <staci.holcom@creativeplanning.com>
Subject: Re: Creative Planning Legal - Thomas Price, Jr.

I need to clarify, I have not had enough coffee this morning.

[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com>
To: Staci Holcom <staci.holcom@creativeplanning.com>


Fri, Oct 9, 2020 at 9:37 AM

Staci,

I am sorry to bother you again this morning. Because of the recent change in my father's trust, Edward Jones has requested that the following document. After reviewing the document, I do not feel comfortable completing. Can you take care of this for me?

Thank you,
Jeff Price

[Quoted text hidden]

 **img-201002134525-0001.pdf**
786K

Staci Holcom <staci.holcom@creativeplanning.com>
To: Jeff Price <tom.j.price@gmail.com>
Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>

Fri, Oct 9, 2020 at 9:40 AM

Hi Jeff,

It's no problem. I'll talk with Maggie about completing this form and get back to you soon.

Staci

Staci Holcom
Paralegal

staci.holcom@creativeplanning.com
Direct: 913.742.7221 | Fax: 913.754.1363
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[Quoted text hidden]

Staci Holcom <staci.holcom@creativeplanning.com>
To: Jeff Price <tom.j.price@gmail.com>
Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>

Mon, Oct 12, 2020 at 5:37 PM

Hi Jeff,

I have completed the form for Edward Jones, except for Tom's ss# and dob. I will let you or him complete that information.

Also, with regard to the Investment Questions on page 1, I would suggest giving them the attached Trustee's Powers from the Trust, so that they can determine if the language supports their products. The Powers are drafted very broad and I believe all of those items will be allowed.

If you title accounts to the Trust, it is very likely that they will request a copy of the entire Trust (which would need to include all of the amendments).

Please let me know if I can be of any further assistance.

Staci

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2 attachments

 **Edward Jones Form.pdf**
824K

 **Price - Trustee's Powers.pdf**
384K

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

Tue, Oct 27, 2020 at 1:46 AM

Karen,

I do not think I forwarded this to you. Dad's SSN and date of birth are not on the form, I am sure you have those. If you need us to update these documents with them please

let me know.

Please let me know if there is anything else you need.

Thank you,
Jeff

[Quoted text hidden]

2 attachments

 **Edward Jones Form.pdf**
824K

 **Price - Trustee's Powers.pdf**
384K