



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

Tom Price's Will

15 messages

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

Mon, Sep 5, 2022 at 6:43 PM

Maggie,

You commented that if my dad wanted to make any additional changes, we could email them to you and come in and sign the documents.

My dad wanted me to let you know that he would like to make three changes, they are:

- 1) Change his Medical Power of Attorney. He would like to make Thomas J. Price III serve as his Attorney in Fact, and if I am not able, then Teresa J. Kuhn will serve as a successor.
- 2) Regarding his trust, he would like to make the following two changes:
 - a. He would like to make Thomas J. Price III the only trustee of his estate
 - b. He would like to change beneficiaries and leave his entire estate to Thomas J. Price III

I will follow up with a phone call first thing in the morning (Tues) to schedule a time to bring him in, hopefully in the next day or two.

Thank you,
Jeff Price

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

Tue, Sep 6, 2022 at 10:48 AM

Jeff,

I can't make all of these changes without talking to your dad.

Talk to you soon.

Maggie Fisher, JD
Attorney

maggie.fisher@creativeplanning.com
Direct: 913.356.5580 | Fax: 913.338.4507
www.creativeplanning.com

5454 W 110th Street, Overland Park, KS 66211

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From: Jeff Price <tom.j.price@gmail.com>
Sent: Monday, September 5, 2022 6:44 PM
To: Maggie Fisher <maggie.fisher@creativeplanning.com>
Subject: Tom Price's Will

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

[Quoted text hidden]

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

Tue, Sep 6, 2022 at 12:10 PM

Maggie,

Do we need to schedule a meeting, or can a phone call suffice?

Jeff

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

Tue, Sep 6, 2022 at 12:22 PM

I replied to Maggie but did not include Staci, so this is a reply all.

What do we need to do next? Can we set up a phone, zoom, or in person this week?

Can we set up a personal meeting, update the documents, and have him sign them at the same time as we did last time?

Thanks,
Jeff

On Tue, Sep 6, 2022 at 10:48 AM Maggie Fisher <maggie.fisher@creativeplanning.com> wrote:

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

Tue, Sep 6, 2022 at 1:27 PM

I would rather do a short phone call with your dad – I can call him this afternoon. Can you 2 come in Thursday afternoon? 2:00?

[Quoted text hidden]

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

Tue, Sep 6, 2022 at 2:42 PM

Are you still thinking about Thursday? Dad does like getting out; it is not an issue to bring dad.

Jeff

[Quoted text hidden]

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

Tue, Sep 6, 2022 at 2:58 PM

I have a spot to discuss things, but not to get all documents done.

[Quoted text hidden]

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

Tue, Sep 6, 2022 at 3:43 PM

Maggie,

I am sorry, but I am confused about the next steps. Is the meeting on Thursday in addition to you contacting him?

~ Jeff

[Quoted text hidden]

Maggie Fisher <maggie.fisher@creativeplanning.com> Tue, Sep 6, 2022 at 4:34 PM
To: Jeff Price <tom.j.price@gmail.com>
Cc: Staci Holcom <staci.holcom@creativeplanning.com>, Tom Price <warwgn@outlook.com>

I won't be ready for him to sign anything until the 19th. I can talk to him today over the phone, or I can talk to him Thursday in person.

[Quoted text hidden]

Tom Price <warwgn@outlook.com> Tue, Sep 6, 2022 at 4:34 PM
To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>

From: Maggie Fisher <maggie.fisher@creativeplanning.com>
Sent: Tuesday, September 6, 2022 4:34:23 PM (UTC-06:00) Central Time (US & Canada)
To: Jeff Price <tom.j.price@gmail.com>
Cc: Staci Holcom <staci.holcom@creativeplanning.com>; Tom Price <warwgn@outlook.com>
Subject: RE: Tom Price's Will

[Quoted text hidden]

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To: Jeff Price <tom.j.price@gmail.com>
Cc: Staci Holcom <staci.holcom@creativeplanning.com>, Tom Price <warwgn@outlook.com>

Or – we can just talk on the phone on Thursday. I got distracted and didn't get to call today.

[Quoted text hidden]

Tom Price <warwgn@outlook.com> Tue, Sep 6, 2022 at 4:42 PM
To: "tom.j.price@gmail.com" <tom.j.price@gmail.com>

From: Maggie Fisher <maggie.fisher@creativeplanning.com>
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Subject: RE: Tom Price's Will

[Quoted text hidden]

Jeff Price <tom.j.price@gmail.com> Tue, Sep 6, 2022 at 6:08 PM
To: Maggie Fisher <maggie.fisher@creativeplanning.com>

I understand entirely the distraction; it happens all the time to me.

Dad likes getting out, so let's meet in your office Thursday afternoon at 2:00.

Thank you,
Jeff

[Quoted text hidden]

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

Wed, Sep 7, 2022 at 7:57 AM

Sounds good. Want to invite Adam?


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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8 attachments

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 **CREATIVE PLANNING** **image002.png**
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 **image001.png**
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image001.png
6K

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Legal, P.A. 11K

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

Wed, Sep 7, 2022 at 8:45 AM

When I talk to him earlier this week, it sounded like his schedule is pretty booked. However, it would be a good time for dad to meet him if he's available.

Sent from my iPhone

On Sep 7, 2022, at 7:57 AM, Maggie Fisher <maggie.fisher@creativeplanning.com> wrote:

Sounds good. Want to invite Adam?

[Quoted text hidden]

6 attachments

 **image001.png**
6K

 **CREATIVE PLANNING** **image002.png**
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 **image001.png**
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