



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

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**Legal representation for Tom Price**

6 messages

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

Thu, Sep 22, 2022 at 10:32 AM

To: Staci Holcom &lt;staci.holcom@creativeplanning.com&gt;, maggie.fisher@creativeplanning.com

Maggie &amp; Staci,

My father needs some legal assistance dealing with Edward Jones. Yesterday he called and asked what the status was on his account. His final adviser, Brook Donley, said Edward Jones is reviewing it and it may take a while. She asked what is his hurry? Dad replied he wanted his money; Brook then asked, "Are you wanting to liquidate his account?" Dad said he wanted access to his money, and she then asked why? He just said he wanted his money.

Brook is aware of the new Financial Power of Attorney. She was asked if she had contacted Maggie for an updated version, and she expressed that Edward Jones feels they have the official POA. What can you do to help dad address this issue?

Yesterday when dad returned from breakfast, there was an envelope on his door from Amanda Fulks, an Adult Protection Services from the Kansas Department of Children and Families. He asked for me to help coordinate a meeting with her. I did call her and left a message.

With all of this, I feel I should step back from helping him and find someone else to assist.

Can you help? Please call me to discuss this at 224-542-9588.

Thanks,  
Jeff Price

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**Maggie Fisher** <maggie.fisher@creativeplanning.com>

Thu, Sep 22, 2022 at 10:47 AM

To: Jeff Price &lt;tom.j.price@gmail.com&gt;, Staci Holcom &lt;staci.holcom@creativeplanning.com&gt;

This is something that Adam can assist you with. He and his coordinating departments are in charge of moving all the money. I would definitely share this with him. I am sorry but we only do estate planning!

**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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**From:** Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>  
**Sent:** Thursday, September 22, 2022 10:32 AM  
**To:** Staci Holcom <[staci.holcom@creativeplanning.com](mailto:staci.holcom@creativeplanning.com)>; Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>  
**Subject:** Legal representation for Tom Price

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[Quoted text hidden]

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**Jeff Price** <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>  
To: [adam.hoppes@creativeplanning.com](mailto:adam.hoppes@creativeplanning.com)

Thu, Sep 22, 2022 at 11:04 AM

The above is the email that I sent to Maggie this morning. Dad needs help, and this is not within my skill set. Can Creative Planning help in any way?

Thanks,  
Jeff

[Quoted text hidden]

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**Mail Delivery Subsystem** <[mailer-daemon@googlemail.com](mailto:mailer-daemon@googlemail.com)>

Thu, Sep 22, 2022 at 11:04 AM

To: tom.j.price@gmail.com



## Address not found

Your message wasn't delivered to **adam.hoppes@creativeplanning.com** because the address couldn't be found, or is unable to receive mail.

The response from the remote server was:

550 permanent failure for one or more recipients ([adam.hoppes@creativeplanning.com:550](mailto:adam.hoppes@creativeplanning.com) 5.4.1 All recipient addresses rejected : Access denied. AS(201806271) [DM6NAM04F...)

Final-Recipient: rfc822; [adam.hoppes@creativeplanning.com](mailto:adam.hoppes@creativeplanning.com)

Action: failed

Status: 5.0.0

Remote-MTA: dns; [d133138a.ess.barracudanetworks.com](https://d133138a.ess.barracudanetworks.com). (209.222.82.255, the server for the domain [creativeplanning.com](https://creativeplanning.com).)

Diagnostic-Code: smtp; 550 permanent failure for one or more recipients ([adam.hoppes@creativeplanning.com:550](mailto:adam.hoppes@creativeplanning.com) 5.4.1 All recipient addresses rejected : Access denied. AS(201806271) [DM6NAM04F...)

Last-Attempt-Date: Thu, 22 Sep 2022 09:04:41 -0700 (PDT)

----- Forwarded message -----

From: Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>

To: [adam.hoppes@creativeplanning.com](mailto:adam.hoppes@creativeplanning.com)

Cc:

Bcc:

Date: Thu, 22 Sep 2022 11:04:21 -0500

Subject: Re: Legal representation for Tom Price

----- Message truncated -----

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**Jeff Price** <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>  
To: [adam.hoppes@creativeplanning.com](mailto:adam.hoppes@creativeplanning.com)

Thu, Sep 22, 2022 at 11:16 AM

The above is the email that I sent to Maggie this morning. Dad needs help, and this is not within my skill set. Can Creative Planning help in any way?

Thanks,  
Jeff

On Thu, Sep 22, 2022 at 10:32 AM Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)> wrote:

[Quoted text hidden]

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**Adam Hoopes** <adam.hoopes@creativeplanning.com>  
To: Jeff Price <tom.j.price@gmail.com>

Thu, Sep 22, 2022 at 2:50 PM

Jeff – I reached out to a few attorneys about referral to a family law attorney. I will let you know when I hear back.

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



SEND ME FILES SECURELY >

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**From:** Jeff Price <tom.j.price@gmail.com>  
**Sent:** Thursday, September 22, 2022 11:16 AM  
**To:** Adam Hoopes <adam.hoopes@creativeplanning.com>  
**Subject:** Re: Legal representation for Tom Price

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