



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

Re: Tom Price - Conservator Letter

2 messages

Jeff Price <tom.j.price@gmail.com>
To: maggie.fisher@creativeplanning.com
Bcc: Amy Lucinda Julo <amyj1966@att.net>

Tue, Mar 7, 2023 at 9:51 AM

Maggie,

David Kirk sent the attached letter out yesterday. He completely missed representing the truth. One item was the relationship dad has with Creative Planning. I did tell him on a call that dad used an attorney (Joe Morse) for over 20 years, Joe sold his practice to Creative Planning and handled his account. Creative Planning has been his estate planning attorney for over 10 years.

I am not sure where this is going.

Any advice?

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David Kirk Letter.pdf
294K

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

Tue, Mar 7, 2023 at 10:00 AM

I think he is just covering himself on the decision to move the money. We will see if anyone objects. He doesn't want to be responsible.

Maggie Fisher, JD, LLM
Partner / Attorney

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From: Jeff Price <tom.j.price@gmail.com>
Sent: Tuesday, March 7, 2023 9:51 AM
To: Maggie Fisher <maggie.fisher@creativeplanning.com>
Subject: Re: Tom Price - Conservator Letter

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