



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

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**Regarding Thomas J Price Jr.**

11 messages

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

Wed, Oct 19, 2022 at 12:53 PM

To: Adam Hoopes &lt;adam.hoopes@creativeplanning.com&gt;, "Dan C. Sanders" &lt;dsanders@kcattorneys.net&gt;, Stacy Janssen &lt;stacey@staceyelderlaw.com&gt;

Adam, Stacy &amp; Dan,

Adam, there was a court hearing this morning and the judge ruled that all of dad's accounts at Edward Jones could be moved to Creative Planning.

I am including Stacy (Dad's attorney) and Dan (my attorney) in this email because one of them will be reaching out to you to make this happen.

There was also conversation regarding a conservatorship. I discuss that with my father this morning and he is in favor of Creative Planning being the conservator if possible. Dad would like to have the same type of set up that he had at Edward Jones, Creative Planning would withhold and pay his taxes and his monthly rent to Cedar Lake Village.

Here is Adam' contact information :

**Adam Hoopes, CFP®**

Partner / Private Wealth Manager

[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)

Direct: 913.356.5513 | Fax: 913.338.4507

[www.creativeplanning.com](http://www.creativeplanning.com)5454 W 110<sup>th</sup> Street, Overland Park, KS 66211

Sent from my iPhone

---

**Adam Hoopes** <adam.hoopes@creativeplanning.com>

Thu, Oct 20, 2022 at 10:59 AM

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

Cc: "Dan C. Sanders" &lt;dsanders@kcattorneys.net&gt;, Stacy Janssen &lt;stacey@staceyelderlaw.com&gt;, Maggie Fisher &lt;maggie.fisher@creativeplanning.com&gt;

Jeff,

Thank you for the update.

It sounds like the court did not find that Tom is ok to sign the transfer forms. Is that correct? If the court did not say that Tom is of capacity, then we cannot transfer accounts from Edward Jones to Charles Schwab (with Creative Planning managing) since Edward Jones would not accept his signature as authorization for the transfers.

For a conservatorship, the court could appoint Creative Planning Trust Company. I will check with them now to see if they have the ability to do this. If they are appointed, then they will absolutely be able to handle his bill payment.

Adam

**Adam Hoopes, CFP®**  
Partner / Private Wealth Manager

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**From:** Jeff Price <tom.j.price@gmail.com>  
**Sent:** Wednesday, October 19, 2022 12:53 PM  
**To:** Adam Hoopes <adam.hoopes@creativeplanning.com>; Dan C. Sanders <dsanders@kcattorneys.net>; Stacy Janssen <stacey@staceyelderlaw.com>  
**Subject:** Regarding Thomas J Price Jr.

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

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---

**Jeff Price** <tom.j.price@gmail.com> Thu, Oct 20, 2022 at 11:08 AM  
To: Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>, Stacy Janssen <stacey@staceyelderlaw.com>, Maggie Fisher <maggie.fisher@creativeplanning.com>

I will have to defer that to Dan or Stacy.

Sent from my iPhone

On Oct 20, 2022, at 10:59 AM, Adam Hoopes <adam.hoopes@creativeplanning.com> wrote:

Jeff,

Thank you for the update.

It sounds like the court did not find that Tom is ok to sign the transfer forms. Is that correct? If the court did not say that Tom is of capacity, then we cannot transfer accounts from Edward Jones to Charles Schwab

(with Creative Planning managing) since Edward Jones would not accept his signature as authorization for the transfers.

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Adam

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**Stacey Janssen** <stacey@staceyelderlaw.com>

Thu, Oct 20, 2022 at 11:11 AM

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

Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>, Maggie Fisher <maggie.fisher@creativeplanning.com>

There is a temporary conservator who could execute the transfer documents. We need to clarify if Creative Planning is serving as the conservator or as the trustee. Does anyone have a copy of the trust? Do we know if the Edward Jones assets are held in Tom's individual name or the trust?

**Stacey L. Janssen**  
Janssen Estate, Probate and Elder Law  
(913) 322-6300  
[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)

Kansas Office  
[15700 College Blvd., Suite 102](#)  
[Lenexa, KS 66219](#)

Missouri Office  
[701 East 63<sup>rd</sup> Street, Suite 300](#)  
[Kansas City, MO 64110](#)

---

**From:** Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>  
**Sent:** Thursday, October 20, 2022 11:08 AM  
**To:** Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>  
**Cc:** Dan C. Sanders <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>; Stacey Janssen <[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)>; Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>  
**Subject:** Re: Regarding Thomas J Price Jr.

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**Maggie Fisher** <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)> Thu, Oct 20, 2022 at 11:15 AM  
To: Stacey Janssen <[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)>, Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>, Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>  
Cc: "Dan C. Sanders" <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>

These are the most recently executed documents. Please let me know if you need copies of anything else.

**Maggie Fisher, JD**  
Attorney

[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)  
Direct: 913.356.5580 | Fax: 913.338.4507  
[www.creativeplanning.com](http://www.creativeplanning.com)

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**From:** Stacey Janssen <[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)>

**Sent:** Thursday, October 20, 2022 11:12 AM

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

**Cc:** Dan C. Sanders <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>; Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>








**Subject:** Re: Regarding Thomas J Price Jr.

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#### 7 attachments

-  **CPL - Price, Thomas Jr. - Assignment Pers Prop 2022.pdf**  
171K
-  **CPL - Price, Thomas Jr. - DPOA 2022.pdf**  
968K
-  **CPL - Price, Thomas Jr. - HCPOA 2022.pdf**  
440K
-  **CPL - Price, Thomas Jr. - HIPAA 2022.pdf**  
205K
-  **CPL - Price, Thomas Jr. - Living Will 2022.pdf**  
142K
-  **CPL - Price, Thomas Jr. - Trust Certification 2022.pdf**  
96K
-  **CPL - Price, Thomas Jr. - Will 2022.pdf**  
331K

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**Stacey Janssen** <[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)>

Thu, Oct 20, 2022 at 11:17 AM

To: Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>, Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>, Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>

Cc: "Dan C. Sanders" <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>

Maggie, do you have the prior documents?

#### **Stacey L. Janssen**

Janssen Estate, Probate and Elder Law

(913) 322-6300

[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)

#### Kansas Office

15700 College Blvd., Suite 102

Lenexa, KS 66219

#### Missouri Office

701 East 63<sup>rd</sup> Street, Suite 300

Kansas City, MO 64110

**From:** Maggie Fisher <maggie.fisher@creativeplanning.com>  
**Sent:** Thursday, October 20, 2022 11:15 AM  
**To:** Stacey Janssen <stacey@staceyelderlaw.com>; Jeff Price <tom.j.price@gmail.com>; Adam Hoopes <adam.hoopes@creativeplanning.com>  
**Cc:** Dan C. Sanders <dsanders@kcattorneys.net>  
**Subject:** RE: Regarding Thomas J Price Jr.

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**Maggie Fisher** <maggie.fisher@creativeplanning.com> Thu, Oct 20, 2022 at 11:23 AM  
To: Stacey Janssen <stacey@staceyelderlaw.com>, Jeff Price <tom.j.price@gmail.com>, Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>

Yes. See attached. Before 2015 Tom and Helen had separate trusts. Let me know if you need those also.

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#### 11 attachments

-  **CPL - Price - Joint Trust - 1st Amendment.pdf**  
170K
-  **CPL - Price - Joint Trust - 2nd Amendment.pdf**  
945K
-  **CPL - Price - Joint Trust - 3rd Amendment.pdf**  
157K
-  **CPL - Price - Joint Trust dated 04-06-2015.pdf**  
2069K
-  **Price, Thomas - FPA.pdf**  
549K
-  **Price, Thomas - Will.pdf**  
338K
-  **Price - Trust dated 04-06-2015.pdf**  
2069K
-  **Price - Trust Certificate.pdf**  
117K
-  **Price - Asset Titling.pdf**  
79K
-  **Price, Thomas - Grant of Power of Appointment.pdf**  
50K
-  **Price, Thomas - Revocation of Trust.pdf**  
68K

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**Stacey Janssen** <stacey@staceyelderlaw.com> Thu, Oct 20, 2022 at 11:27 AM  
To: Maggie Fisher <maggie.fisher@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>

Thank you.

**Stacey L. Janssen**  
Janssen Estate, Probate and Elder Law

(913) 322-6300  
stacey@staceyelderlaw.com

Kansas Office  
15700 College Blvd., Suite 102  
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Missouri Office  
701 East 63<sup>rd</sup> Street, Suite 300  
Kansas City, MO 64110

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

**Sent:** Thursday, October 20, 2022 11:23 AM

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**Adam Hoopes** <adam.hoopes@creativeplanning.com>

Thu, Oct 20, 2022 at 1:25 PM

To: Stacey Janssen <stacey@staceyelderlaw.com>, Jeff Price <tom.j.price@gmail.com>

Cc: "Dan C. Sanders" <dsanders@kcattorneys.net>, Maggie Fisher <maggie.fisher@creativeplanning.com>

Stacey & Jeff,

Here are Tom's bank & investment accounts:

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**Bank Accounts**

Bank of Blue Valley

Thomas's Checking Account (Joint with Jeff)

Enterprise Bank & Trust

Thomas's Checking Account (Social Security & P&G DB are deposited there)

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**Qualified Accounts**

Edward Jones

Thomas's IRA x6710

Thomas's IRA x6019

Thomas's Roth IRA x3014

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**Taxable Investments**

Edward Jones

Thomas Jr & Helen J. Price Trust's Investment Account x0011

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He also has two 529 plan accounts.

Creative Planning Trust Company confirmed that they cannot act as a conservator. They recommended reaching out to another organization and referenced Arcane, Inc (based in Overland Park) as a possible solution:

<https://arcare.org/>

Adam

**Adam Hoopes, CFP®**  
Partner / Private Wealth Manager

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**Dan C. Sanders** <dsanders@kcattorneys.net>  
To: Stacey Janssen <stacey@staceyelderlaw.com>

Tue, Oct 25, 2022 at 11:49 AM

Stacy-

Just tried to call you.

Please call me on cell 816-729-3804. Thx.

---

**From:** Dan C. Sanders  
**Sent:** Monday, October 24, 2022 3:30 PM  
**To:** Stacey Janssen <stacey@staceyelderlaw.com>  
**Subject:** RE: Regarding Thomas J Price Jr.



Stacee-

Please give me a call. Thx.

Dan C. Sanders

MONACO, SANDERS, RACINE, POWELL & REIDY, L.L.C.

8700 State Line Road, Suite 110

Leawood, Kansas 66206

Main: (816) 523-2400, ext. 2

Direct dial: (816) 209-6837

Cell: (816) 729-3804

Fax: (816) 942-0006

[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)

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**From:** Stacey Janssen <[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)>

**Sent:** Thursday, October 20, 2022 11:27 AM

**To:** Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>; Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>; Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>

**Cc:** Dan C. Sanders <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>

**Subject:** Re: Regarding Thomas J Price Jr.

Thank you.

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[Quoted text hidden]

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

Tue, Oct 25, 2022 at 4:08 PM

Jeff-

Here is the form sent to me by Stacy. It is my understanding that Dr. Shermoly is schedule to see your dad on November 4<sup>th</sup> and CT is scheduled for November 7<sup>th</sup>. I doubt Dr. Shermoly will want to complete form until CT results are back.

I spoke with Stacy today about transferring assets to Creative Planning. We both agreed that we will need to draft a short order for judge to sign to effect transfer. In that regard, we will need to see the most current Edward Jones Statement you have showing what the assets are and account numbers they are managing. It is my understanding that there are two IRA accounts and one Trust account. Can you email that to me.

As to paying bills, that is something Creative Planning can do, presumably out of the Trust account. The only money that should be coming out of the IRA accounts are the minimum required yearly distributions which I assume have been going into the Trust account at Edward Jones. Can you get me a list of the current bills for the past month, and the typical monthly bills that come in for your father. Hopefully it can be set up on an auto pay system.

Stacy also suggested we name Creative Planning as successor Trustee which they might be willing to do (even though they do not want to be conservator). We need to talk about that since that may be something your dad needs to agree to. Also we can talk about some sort of co-trustee arrangement.

---

**From:** Stacey Janssen <stacey@staceyelderlaw.com>  
**Sent:** Tuesday, October 25, 2022 1:21 PM  
**To:** Dan C. Sanders <dsanders@kcattorneys.net>  
**Subject:** Re: Regarding Thomas J Price Jr.

Here is the evaluation form the court referenced.

**Stacey L. Janssen**

Janssen Estate, Probate and Elder Law

(913) 322-6300

[stacey@staceyelderlaw.com](mailto:stacey@staceyelderlaw.com)

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Lenexa, KS 66219

Missouri Office


701 East 63<sup>rd</sup> Street, Suite 300

Kansas City, MO 64110

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 **FORM - KS Report of Examination and Evaluation.pdf**  
55K