



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

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**Thomas Price, JR - Fin POA**

8 messages

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**Adam Hoopes** <adam.hoopes@creativeplanning.com>  
To: Maggie Fisher <maggie.fisher@creativeplanning.com>  
Cc: Jeff Price <tom.j.price@gmail.com>

Wed, Dec 28, 2022 at 1:53 PM

Maggie,

Jeff called me. Once open question is when the first Fin POA was issued – 8/23 or 8/24.

This was before me – so I was not aware.

I've copied Jeff on this email.

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 FILES SECURELY >

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**Maggie Fisher** <maggie.fisher@creativeplanning.com>  
To: Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: Jeff Price <tom.j.price@gmail.com>

Wed, Dec 28, 2022 at 1:58 PM

It was signed August 30, 2022. Please see attached.

**Maggie Fisher, JD**  
Attorney

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

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 **CPL - Price, Thomas Jr. - DPOA 2022.pdf**  
968K

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**Jeff Price** <tom.j.price@gmail.com>  
To: Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: Maggie Fisher <maggie.fisher@creativeplanning.com>

Wed, Dec 28, 2022 at 7:21 PM

Maggie,

When did Edward Jones ask about the POA and you forwarded it over to them, it was some time in August I was thinking?

Sent from my iPhone

On Dec 28, 2022, at 1:53 PM, Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)> wrote:

Maggie,

Jeff called me. Once open question is when the first Fin POA was issued – 8/23 or 8/24.

This was before me – so I was not aware.

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Adam

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<image001.png>

<image002.png>

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**Maggie Fisher** <maggie.fisher@creativeplanning.com> Thu, Dec 29, 2022 at 11:06 AM  
To: Jeff Price <tom.j.price@gmail.com>, Adam Hoopes <adam.hoopes@creativeplanning.com>  
Cc: Staci Holcom <staci.holcom@creativeplanning.com>

We did get this fax from Edward Jones on 8/24. I can't find any email or fax that I sent to them. I did send all the estate planning documents on October 20 to Stacy Janssen.

I can have Staci look on Tuesday.

Who would we have sent it to?

**Maggie Fisher, JD**  
Attorney

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**Sent:** Wednesday, December 28, 2022 7:21 PM  
**To:** Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>  
**Cc:** Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>  
**Subject:** Re: Thomas Price, JR - Fin POA

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

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 **2022-08-24 from Edward Jones.pdf**  
429K

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

Thu, Dec 29, 2022 at 11:10 AM

Thank you, please follow up on Tuesday.

[Quoted text hidden]

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

Mon, Jan 2, 2023 at 4:09 PM

We cannot find ever having sent any information to Edward Jones. See Staci's response below.

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**From:** Staci Holcom <staci.holcom@creativeplanning.com>  
**Sent:** Monday, January 2, 2023 4:05 PM  
**To:** Maggie Fisher <maggie.fisher@creativeplanning.com>  
**Subject:** RE: Thomas Price, JR - Fin POA

Hi Maggie,

I don't think that we sent anything to them. Right after the new DPOA was signed on 8/30/2022, and the remaining updates on 9/19/2022, we learned of the first doctors letter dated 9/7/2022 and the 9/23/2022 Notice from Adult Protective Services. I *think* we decided not to send anything until this was resolved.

Or, we may have told the son to send the new DPOA. But either way, I don't find anything from us to Edward Jones.

Staci

**Staci Holcom**  
Paralegal

staci.holcom@creativeplanning.com  
Direct: 913.742.7221 | Fax: 913.754.1363  
[www.creativeplanninglegal.com](http://www.creativeplanninglegal.com)

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**From:** Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)>  
**Sent:** Monday, January 2, 2023 3:46 PM  
**To:** Staci Holcom <[staci.holcom@creativeplanning.com](mailto:staci.holcom@creativeplanning.com)>  
**Subject:** FW: Thomas Price, JR - Fin POA

Can you look at this? I can't find where I faxed or emailed anything to anyone at Edward Jones. I think this is part of the litigation over his dad – the conservatorship.

Thanks!

[Quoted text hidden]

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

Tue, Jan 3, 2023 at 9:41 AM

It would have been mid-August, around 8/15-8/20.

Thank you for letting me know.

Jeff

Sent from my iPhone

On Jan 2, 2023, at 4:09 PM, Maggie Fisher <[maggie.fisher@creativeplanning.com](mailto:maggie.fisher@creativeplanning.com)> wrote:

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

Tue, Jan 3, 2023 at 9:43 AM

We did not send it to them.

**Maggie Fisher, JD, LLM**  
Partner / Attorney

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