



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

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**Thomas Price**

12 messages

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

Thu, Mar 2, 2023 at 3:19 PM

To: maggie.fisher@creativeplanning.com, Adam Hoopes &lt;adam.hoopes@creativeplanning.com&gt;

Maggie &amp; Adam,

I have two sets of questions, one set for Maggie and the other for Adam.

Maggie,

Dad was not able to change the Beneficiary at Edward Jones before they froze his account. The attached documents are how the beneficiaries are currently set up at Edward Jones. What issues does this cause now? If another set of new accounts is set up at Creative Planning through the conservator with the same beneficiaries as Edward Jones, what issues will that have with dad's changes to his Will/Trust?

Adam,

How are beneficiaries set up on dad's new accounts, the ones you set up?

Thanks,  
Jeff

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 **tjp-03022023140547.pdf**  
88K

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

Thu, Mar 2, 2023 at 3:23 PM

To: Jeff Price &lt;tom.j.price@gmail.com&gt;, Adam Hoopes &lt;adam.hoopes@creativeplanning.com&gt;

On Edward Jones, it is still going to a trust for your benefit through your parents' trust. So we just put the name of the trust and not name the testamentary trust that is to be created in the future. Gives it more flexibility in the event that you or Theresa have passed away.

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

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**From:** Jeff Price <tom.j.price@gmail.com>  
**Sent:** Thursday, March 2, 2023 3:19 PM  
**To:** Maggie Fisher <maggie.fisher@creativeplanning.com>; Adam Hoopes <adam.hoopes@creativeplanning.com>  
**Subject:** Thomas Price

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**Jeff Price** <tom.j.price@gmail.com>  
To: "Dan C. Sanders" <dsanders@kcattorneys.net>  
Bcc: Amy Lucinda Julo <amyj1966@att.net>

Thu, Mar 2, 2023 at 3:50 PM

Dan,

Here is Maggie's answer.

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

Thu, Mar 2, 2023 at 3:55 PM

I just want to confirm that having the beneficiary set up as Edward Jones has them is not an issue, correct? For example, if dad was to pass today, what would happen?

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

Thu, Mar 2, 2023 at 3:57 PM

Jeff,

Here are the accounts.

29602412---IRA Rollover---Thomas J Price Jr---Schwab  
73922102---Trust---Thomas J Price Jr---Schwab  
45354513---Roth---Thomas J Price Jr---Schwab

The IRA and Roth have the trust as the beneficiary.

Adam

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

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Maggie & Adam,

[Quoted text hidden]

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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>

Thu, Mar 2, 2023 at 4:01 PM

I want to thank you both, it is such a pleasure working with you.

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

Thu, Mar 2, 2023 at 4:02 PM

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

There would be a problem because – if the current trust is accepted – she does not have a trust for her benefit anymore.

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

Thu, Mar 2, 2023 at 4:18 PM

So what would happen?

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

Thu, Mar 2, 2023 at 4:21 PM

Happy to help!

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

Fri, Mar 3, 2023 at 8:56 AM

Probably have to go to court, so it will definitely need to be changed.

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

Fri, Mar 3, 2023 at 9:10 AM

If I am understanding it all correctly, the accounts that the conservatory wants to create need to be set up the same as Adam did when we set up the accounts for dad. Correct me if I am wrong.

Thanks,  
Jeff

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

Fri, Mar 3, 2023 at 9:31 AM

Yes – with the trust as the beneficiary.

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