



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

Tom Price's Tax Portability

3 messages

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

Tue, Oct 19, 2021 at 2:34 PM

To: Megan Schneider <Megan.Schneider@edwardjones.com>

Cc: Tom Price <warwgn@outlook.com>

Megan,

Attached is the response from my dad's attorney regarding his Tax Portability.

The question is the dad leave mom's stock in her trust or did he move her stock into his trust?

Can you confirm?

Thanks
Jeff Price

Sent from my iPhone

Begin forwarded message:

From: Maggie Fisher <maggie.fisher@creativeplanning.com>**Date:** October 18, 2021 at 9:58:01 AM CDT**To:** tom.j.price@gmail.com, warwgn@outlook.com**Cc:** Eric Pfanstiel <eric.pfanstiel@creativeplanning.com>**Subject:** Creative Planning - Estate Planning

Jeff and Tom,

Eric said that he talked to Joe Morris. "Apparently, Tom used his limited power of appointment as executor of wife's estate to move the P&G stock from his trust to hers and get a step up. No estate tax return was filed. If Tom left the stock in her trust, there is probably no problem. If he has moved her assets to his trust, there may be some planning to do." Please let us know what he did with the stock and where it sits now.

Also, if you could provide the total value of Tom's current estate, we can make some decisions about how to plan for the future.

Thank you!

Maggie

Maggie Fisher, JD
Attorney

maggie.fisher@creativeplanning.com
Direct: 913.356.5580 | Fax: 913.338.4507
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5454 W 110th Street, Overland Park, KS 66211[SCHEDULE A MEETING >](#)

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Jeff Price <tom.j.price@gmail.com>
To: Megan Schneider <Megan.Schneider@edwardjones.com>
Cc: Tom Price <warwgn@outlook.com>

Thu, Oct 28, 2021 at 7:52 PM

Megan,

As this week is coming to an end, I am following up on my todos.

Have you had time to follow up on the attached?

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Schneider, Megan <Megan.Schneider@edwardjones.com>
To: Jeff Price <tom.j.price@gmail.com>, "Donley Behrens, Brooke" <Brooke.Donley.Behrens@edwardjones.com>

Fri, Oct 29, 2021 at 7:43 AM

Good Morning,

My apologies for the delay. I will get with Brooke this morning and get you a response.

Megan Schneider

Edward Jones Investments

Office of Brooke Donley Behrens

13401 S Mur-Len Road

Olathe, KS 66062

☎ (913) 764-2400

From:

Sent: Thursday, October 28, 2021 7:52 PM

To:

Cc:

Subject: Re: Tom Price's Tax Portability

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Megan,

As this week is coming to an end, I am following up on my todos.

Have you had time to follow up on the attached?

Megan Schneider
Branch Office Administrator
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Olathe, KS 66062
(913) 764-2400
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