



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

---

**Creative Planning - Accounts for Thomas J. Price, Jr.**

5 messages

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

Tue, Feb 14, 2023 at 1:01 PM

To: David Kirk &lt;dkirk121@yahoo.com&gt;

Cc: Jeff Price &lt;tom.j.price@gmail.com&gt;, "Dan C. Sanders" &lt;dsanders@kcattorneys.net&gt;, "warwgn@outlook.com" &lt;warwgn@outlook.com&gt;

David,

Thank you for talking with me today. I am reach out to my Operations Team to coordinate the transfer from Edward Jones to Tom's accounts that we opened at Charles Schwab.

Attached are the court documents that you sent me today. We will share these with Charles Schwab now.

I will let you know as I hear additional information on this process.

Thank you,  
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 >](#)

---

**From:** David Kirk <dkirk121@yahoo.com>  
**Sent:** Tuesday, February 14, 2023 11:03 AM  
**To:** Adam Hoopes <adam.hoopes@creativeplanning.com>  
**Subject:**

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



David C. Kirk  
8000 Foster  
Overland Park, KS 66204

Mailing:  
P.O. Box 13304  
Overland Park, KS 66282  
913 940-7600  
Fax: 913 642-5860  
E-Mail: [dkirk121@yahoo.com](mailto:dkirk121@yahoo.com)

If you are not the intended recipient of this email, the sender requests that you destroy this email.

---

**2 attachments**

-  **Temp Cons.pdf**  
15K
-  **Order.pdf**  
32K

---

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

Tue, Feb 14, 2023 at 1:47 PM

Get [Outlook for iOS](#)



---

**From:** Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)>  
**Sent:** Tuesday, February 14, 2023 1:01:38 PM  
**To:** David Kirk <[dkirk121@yahoo.com](mailto:dkirk121@yahoo.com)>  
**Cc:** Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>; Dan C. Sanders <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>; [warwgn@outlook.com](mailto:warwgn@outlook.com)  
<[warwgn@outlook.com](mailto:warwgn@outlook.com)>  
**Subject:** Creative Planning - Accounts for Thomas J. Price, Jr.

[Quoted text hidden]

---

**2 attachments**

-  **Temp Cons.pdf**  
15K
-  **Order.pdf**  
32K

---

**Adam Hoopes** <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)> Tue, Feb 14, 2023 at 7:05 PM  
To: David Kirk <[dkirk121@yahoo.com](mailto:dkirk121@yahoo.com)>, Jeff Price <[tom.j.price@gmail.com](mailto:tom.j.price@gmail.com)>, "Dan C. Sanders" <[dsanders@kcattorneys.net](mailto:dsanders@kcattorneys.net)>, "[warwgn@outlook.com](mailto:warwgn@outlook.com)" <[warwgn@outlook.com](mailto:warwgn@outlook.com)>

All – We have reached out to Charles Schwab and are working on the next steps.

Per Ops:

The good news is that Charles Schwab is familiar with temporary conservatorships and they have to act on a court order. They will review both court documents and the accounts will become restricted once the date for the temporary conservator is up. The court order would lay out the next steps for a new conservator (or extension). For the IRAs, we just need IRA applications completed by David. We can convert the existing IRAs to the conservatorship accounts.

For the trust, normally when someone becomes incapacitated we follow the trust language to see how to proceed. I did see some language on the AGREED ORDER TRANSFERRING ASSETS OF PROPOSED WARD letter that tells me that David is being named conservator on the trust. Schwab's legal team would need to review the letter to see if this is acceptable and then would need to circle bank with us to see what documents are required to add David as conservator on the trust.

I've asked Ops to get started on this ASAP.

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 >

[Quoted text hidden]

---

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

Tue, Feb 14, 2023 at 7:22 PM

Dan,

Wait, what is this that "David is being named conservator on the trust". We're did that come from?

David is being named conservator on the trust.

Sent from my iPhone

On Feb 14, 2023, at 7:05 PM, Adam Hoopes <[adam.hoopes@creativeplanning.com](mailto:adam.hoopes@creativeplanning.com)> wrote:

All – We have reached out to Charles Schwab and are working on the next steps.

Per Ops:

The good news is that Charles Schwab is familiar with temporary conservatorships and they have to act on a court order. They will review both court documents and the accounts will become restricted once the date for the temporary conservator is up. The court order would lay out the next steps for a new conservator (or extension). For the IRAs, we just need IRA applications completed by David. We can convert the existing IRAs to the conservatorship accounts.

For the trust, normally when someone becomes incapacitated we follow the trust language to see how to proceed. I did see some language on the AGREED ORDER TRANSFERRING ASSETS OF PROPOSED WARD letter that tells me that David is being named conservator on the trust. Schwab's legal team would need to review the letter to see if this is acceptable and then would need to circle bank with us to see what documents are required to add David as conservator on the trust.

I've asked Ops to get started on this ASAP.

Adam

**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

<image001.png>

<image002.png>

---

**From:** Adam Hoopes  
**Sent:** Tuesday, February 14, 2023 1:02 PM  
**To:** David Kirk <dkirk121@yahoo.com>  
**Cc:** Jeff Price <tom.j.price@gmail.com>; Dan C. Sanders <dsanders@kcattorneys.net>; warwgn@outlook.com  
**Subject:** Creative Planning - Accounts for Thomas J. Price, Jr.

David,

Thank you for talking with me today. I am reach out to my Operations Team to coordinate the transfer from Edward Jones to Tom's accounts that we opened at Charles Schwab.

Attached are the court documents that you sent me today. We will share these with Charles Schwab now.

I will let you know as I hear additional information on this process.

Thank you,  
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

<image001.png>

<image002.png>

[Quoted text hidden]

---

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

Tue, Feb 14, 2023 at 7:28 PM

There is nothing in the order that names Kirk as conservator of the Trusts. Adam is in error.

Dan C. Sanders

1/22/24, 3:53 PM

Gmail - Creative Planning - Accounts for Thomas J. Price, Jr.

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

[8700 State Line Road, Suite 110](#)

[Leawood, Kansas 66206](#)

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

Direct dial: (816) 209-6837

Fax: (816) 942-0006

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

[Quoted text hidden]