

Creative Planning - Accounts for Thomas J. Price, Jr. - DocuSign or paper forms?

18 messages

Adam Hoopes <adam.hoopes@creativeplanning.com>

Wed, Feb 15, 2023 at 9:26 AM

To: David Kirk <dkirk121@yahoo.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

David – Operations can send you DocuSigns to approve to open the accounts. They will need your cell number (Schwab requirement for DocuSigns). If not then would you like us to send you paper forms to sign or email them to you?

Adam Hoopes, CFP®

Partner / Private Wealth Manager

adam.hoopes@creativeplanning.com Direct:
913.356.5513 | Fax: 913.338.4507
www.creativeplanning.com

5454 W 110th Street, Overland Park, KS 66211

**David Kirk** <dkirk121@yahoo.com>

Wed, Feb 15, 2023 at 11:01 AM

Reply-To: David Kirk <dkirk121@yahoo.com>

To: Adam Hoopes <adam.hoopes@creativeplanning.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com> cell is 913/940-7600

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

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On Wednesday, February 15, 2023 at 09:26:37 AM CST, Adam Hoopes <adam.hoopes@creativeplanning.com> wrote:

1/22/24, 4:15 PM

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Adam Hoopes <adam.hoopes@creativeplanning.com>

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OK – thank you!

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Subject: Re: Creative Planning - Accounts for Thomas J. Price, Jr. - DocuSign or paper forms?

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[Quoted text hidden]

Adam Hoopes <adam.hoopes@creativeplanning.com>

Thu, Feb 16, 2023 at 10:42 AM

To: David Kirk <dkirk121@yahoo.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

David – just left you a vm. Feel free to call my cell 913-549-8069

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cell is 913/940-7600

Adam Hoopes <adam.hoopes@creativeplanning.com> Thu, Feb 16, 2023 at 12:37 PM
To: David Kirk <dkirk121@yahoo.com>
Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

David – Jeff Price just called me and asked me to send the fee schedule for working with Creative Planning.

FEE SCHEDULE
For All Assets Under Management
1.20% on the first \$500,000 then
1.00% on assets of \$500,001 to \$2,000,000 then
0.85% on assets of \$2,000,001 to \$5,000,000 then
0.80% on assets of \$5,000,001 to \$10,000,000 then
0.70% on assets of \$10,000,001 to \$25,000,000 then
0.40% on assets of \$25,000,001 to \$50,000,000 then
0.30% on assets of \$50,000,001 to \$100,000,000 then
0.25% on all assets over \$100,000,000

These fees are based on the investment accounts and paid quarterly. That means you would divide them by 4 and that is what is paid on the month following the end of each quarter.

There are no fees to start with Creative Planning or stop.

1/22/24, 4:15 PM

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In addition, we use very low cost Exchange Traded Funds (ETFs) that bring the overall costs of the portfolio below the cost of most mutual funds.

Let me know if you would like to discuss.

Adam

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 A green screen with white text Description automatically generated with medium confidence

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Subject: RE: Creative Planning - Accounts for Thomas J. Price, Jr. - DocuSign or paper forms?

OK – thank you!

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David Kirk <dkirk121@yahoo.com>

Thu, Feb 16, 2023 at 1:11 PM

Reply-To: David Kirk <dkirk121@yahoo.com>

To: Adam Hoopes <adam.hoopes@creativeplanning.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

I am going to forward this to Mr. Price's attorney and his appointed counsel for their review.

Thank you

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

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Adam Hoopes <adam.hoopes@creativeplanning.com>

Thu, Feb 16, 2023 at 1:12 PM

To: David Kirk <dkirk121@yahoo.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

Ok, let me know if you have any questions.
Adam

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Adam Hoopes <adam.hoopes@creativeplanning.com>

Thu, Feb 23, 2023 at 9:17 AM

To: David Kirk <dkirk121@yahoo.com>

Cc: Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>

David – You asked me to remind you of when the temporary order was going to expire. I have a note that it will expire on Saturday 2/25.

Please advise if you have any questions.

Adam

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Ok, let me know if you have any questions.

Adam

Adam Hoopes, CFP®

Partner / Private Wealth Manager

1/22/24, 4:15 PM

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Cc: Jessica Smith <jessica.smith@creativeplanning.com>

Wed, Mar 22, 2023 at 2:59 PM

All – Charles Schwab reached out to Creative Planning to ask if we will be working to create updated accounts using a current (not expired) court order. Does anyone have any input to share?

Adam

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Partner / Private Wealth Manager

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Cc: Jeff Price <tom.j.price@gmail.com>; Dan C. Sanders <dsanders@kcattorneys.net>; warwgn@outlook.com **Subject:**
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David Kirk <dkirk121@yahoo.com>

Thu, Mar 23, 2023 at 7:20 AM

Reply-To: David Kirk <dkirk121@yahoo.com>

To: Jeff Price <tom.j.price@gmail.com>, "Dan C. Sanders" <dsanders@kcattorneys.net>, "warwgn@outlook.com" <warwgn@outlook.com>, Adam Hoopes <adam.hoopes@creativeplanning.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>

I have asked that Creative Planning leave me alone. I know where to find you if I need you.

When you blast out these e-mails, every attorney on here is billing for looking at it.

Stop it.

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

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On Wednesday, March 22, 2023 at 02:59:43 PM CDT, Adam Hoopes <adam.hoopes@creativeplanning.com> wrote:

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Partner / Private Wealth Manager

1/22/24, 4:15 PM

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Adam Hoopes <adam.hoopes@creativeplanning.com>

Thu, Mar 23, 2023 at 8:51 AM

To: David Kirk <dkirk121@yahoo.com>, Jeff Price <tom.j.price@gmail.com>

Cc: Jessica Smith <jessica.smith@creativeplanning.com>, "warwgn@outlook.com" <warwgn@outlook.com>

David – Ok thank you for your email. I have made a note. Also, I removed the other attorney from this email.

Jeff – Please share with your attorney if you would like.

Adam

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