

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Upcoming Activities**

List sorted by Activity Date

Activity Date	Type	Name	Description	Need	Maturity Date	Amount
*** No upcoming activities exist for this contact. ***						

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
04/03/23	Note	04/03/23	PRICE JR, TOM ADV IFEDJ IRA Ac 92588167	Home Office Correspondence: 4 Wks Action Req- Adv Solutions Missing Req			
03/31/23	ToDo	03/31/23	Price, Tom	Make sure check is cleared.			
03/29/23	Note	03/29/23	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Email: VOC - Client Relationship Survey Email --- Voice of Client Survey letter emailed 3/29/233			
03/24/23	ToDo	03/22/23	Price, Tom	Make sure Benton House cleared.			
03/21/23	Note	03/21/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Home Office Correspondence: Activity in Your Account (NC_R_R)			
03/20/23	ToDo	03/20/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Send Rent check to Benton House			
03/14/23	Note	03/14/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Home Office Correspondence: Activity in Your Account (NC_R_R)			
03/13/23	Note	03/13/23	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Email: Daily Market Snapshot - BOA --- Daily Market Snapshot re Silicon Valley Bank failure emailed 3/13/23			
03/03/23	Note	03/03/23	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to warwgn@outlook.com			
03/02/23	Note	03/02/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Address Verification Letter: Address / Name Change			

## Relationship Activities And Notes

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**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
03/01/23	Note	03/01/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	David requested the beneficiary forms for Tom's IRA. I faxed them to 913-642-5860. I scanned in updated court order with date extension on his conservatorship.			
03/01/23	Note	03/01/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	David Kirk called and requested that I change his address to his PO BOX 13304 Overland Park, KS 66282. I called home office and Grace assisted me in the process.			
02/21/23	Note	02/21/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Home Office Correspondence: Activity in Your Account (NC_R_R)			
02/18/23	Note	02/18/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Address Verification Letter: Address / Name Change			
02/17/23	ToDo	02/17/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Send Rent check to Benton House			
02/16/23	ToDo	12/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
02/16/23	ToDo	11/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
02/16/23	ToDo	10/14/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
02/16/23	ToDo	09/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			

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**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
List sorted by Completion Date and Time							
Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
02/16/23	ToDo	12/22/23	Price, Tom	*** RECURRING ACTIVITY EXPIRES TODAY ***Make sure rent check was sent out.			
02/16/23	ToDo	12/22/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	11/22/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	10/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	09/22/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	08/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	07/21/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	06/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	05/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	04/21/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	03/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	ToDo	02/23/23	Price, Tom	Make sure rent check was sent out.			
02/16/23	Note	02/16/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Spoke with Tom's temporary conservator David Kirk and he informed me that he wants to stop the monthly payments going from IRA to trust and use his rent to help satisfy his RMD instead. He gave me the new location name, address and monthly amounts that I need to send. He is now added to list holders. Josephine wanted to set up a SWPS but the amounts are different every month so I can't do that. I will pay Tom's rent payment from his current facility out of the 92590560 which everything will be coming from. He said that he is open to a annual review if he becomes the permanent conservator. MS			
02/15/23	ToDo	02/15/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			

### Relationship Activities And Notes

**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
List sorted by Completion Date and Time							
Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
02/07/23	ToDo	02/07/23	PRICE, TOM & HELEN (Trust Acco 92525200	Birthday Call: Tom 2/7. Have Brooke call			
02/03/23	Note	02/03/23	PRICE, TOM 529 KELLEDOther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to warwgn@outlook.com			
02/01/23	ToDo	02/01/23	PRICE, TOM & HELEN (Trust Acco 92525200	Call Cedar Lake Village and make sure rent has been received.			
01/31/23	Note	01/31/23	Price, Tom	Terri called and informed me that there is a mediation tomorrow, but nothing will probably get resolved because Jeff will have to agree that Tom needs a Guardian and that probably won't happen. They have a court date around March 6th. She thinks that they are going to require all the money to get moved into a trust, but nothing is certain at this time. She will follow up with any additional information if something changes.			
01/27/23	Note	01/27/23	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Activity in Your Account (NC_R)			
01/27/23	Note	01/27/23	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Activity in Your Account (NC_R)			
01/25/23	ToDo	01/23/23	Price, Tom	Make sure rent check was sent out.			
01/25/23	ToDo	01/20/23	Price, Tom	Email Dan to lift restrictions to send Monthly SWPS on the 20th. Sent 4,597.00 to pay his rent.			

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**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
01/19/23	Note	01/19/23	Price, Tom	Talked to Rob from Cedar Lake Village and Tom's rent is increasing because he is transferring to another apt for additional care. The next two months have some additional expenses do to cleaning fees and deposits on his new apt. His new rent total will be \$6008 and I have requested invoices moving forward due to the increase in. Tomorrow I will request two checks. One for \$527 to cleaning expenses and \$7,283 for Jan/February rent and security deposit. Rob is going to email me this so I have documentation.			

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**Price, Tom**

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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
01/19/23	Note	01/19/23	PRICE, TOM & HELEN (Trust Acco 92525200)	Contacted Kim in Senior protection team after receive letter from client and was told to scan in under incoming correspondence.			
01/18/23	Note	01/18/23	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Activity in Your Account (NC_R)			
01/18/23	Note	01/18/23	PRICE JR, TOM ADV IRADJ IRA Ac 92588167	Home Office Correspondence: FA Brochure to Service Advisory Accounts Letter			
01/18/23	ToDo	01/17/23	Price, Tom	Make sure money transferred from IRA to Trust.			
01/13/23	ToDo	01/13/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
01/11/23	MDue	01/25/23	PRICE, TOM & HELEN (Trust Acco 92525200)	2.65% MORGAN STANLEY BK N A SALT CERTIFICATE OF DEPOSIT		01/25/23	\$75,000
01/11/23	MDue	01/10/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	3.00% CITIBANK NATL ASSN SIOUX FALLS CERTIFICATE OF DEPOSIT		02/07/23	\$20,000
01/11/23	MDue	11/09/22	PRICE, TOM & HELEN (Trust Acco 92525200)	2.50% WELLS FARGO BK N A SIOUX FALLS CERTIFICATE OF DEPOSIT		12/08/22	\$108,000
01/11/23	MDue	09/01/22	PRICE, TOM & HELEN (Trust Acco 92525200)	3.12% DICKINSON CNTY KANS UNI SCH DI SCH BLDG		09/01/22	\$30,000
01/11/23	ToDo	01/11/23	Price, Tom	Check went out.			
01/10/23	Note	01/10/23	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to warwgn@outlook.com			
01/10/23	ToDo	01/10/23	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	Check monthly tasc- should it be changed to equal RMD amount? Having all RMD taken from Select IRA in monthly amounts			

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**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
12/27/22	Note	12/27/22	Price, Tom	Tue, 27-Dec-2022 1:00pm : "Client" called in and passed verification questions and introduced himself as Tom but did not sound like the age of client. I sent call to branch and it was not the client. It was the client's son Jeff.			
12/26/22	Note	12/26/22	PRICE JR, TOM ADV IREDJ IRA Ac 92588167	Home Office Correspondence: Advisory Solutions- Annual Review Past Due			
12/20/22	ToDo	12/20/22	Price, Tom	Email Dan to lift restrictions to send Monthly SWPS on the 20th. Sent 4,597.00 to pay his rent.			
12/15/22	ToDo	12/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
12/07/22	ToDo	12/05/22	PRICE, TOM & HELEN (Trust Acco 92525200	rqst'd 11/2 Have Jim Easley's office request II for Hartford Life Policy that Kids have. Glitch in system in 2016. Possibly try to talk them through doing the II on their own system? Emailed Jim's BOA 12/3			
12/06/22	Note	12/06/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to warwgn@outlook.com			

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<b>Price, Tom</b>
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Completed Activities from January 01, 2021 thru April 06, 2023							
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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
11/29/22	ToDo	11/28/22	Price, Tom	Call and find out how the court date went.			
11/28/22	Note	11/28/22	PRICE JR, TOM ADV IREDJ IRA Ac 92588167	Home Office Correspondence: Advisory Solutions- Missing Program Requirement			
11/21/22	Note	11/21/22	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Activity in Your Account (NC_R)			
11/21/22	ToDo	11/21/22	Price, Tom	Make sure SWPS got sent			
11/18/22	ToDo	11/18/22	Price, Tom	Email Dan to lift restrictions to send Monthly SWPS on the 20th. Sent 4,597.00 to pay his rent.			
11/15/22	ToDo	11/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Tue, 15-Nov-2022 11:39am (Tailored BOA Support, Dailey, Stephanie E): recurring task processed Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
11/13/22	Note	11/13/22	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Activity in Your Account (NC_R)			
11/11/22	MDue	11/08/22	PRICE, TOM & HELEN (Trust Acco 92525200	2.40% CAPITAL ONE BK USA NATL ASSN CERTIFICATE OF DEPOSIT		11/08/22	\$25,000
11/05/22	Note	11/05/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to warwgn@outlook.com			
10/21/22	Note	10/21/22	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Activity in Your Account (NC_R)			
10/20/22	ToDo	10/20/22	PRICE, TOM & HELEN (Trust Acco 92525200	*** RECURRING ACTIVITY EXPIRES TODAY ***Email Dan to lift restrictions to send Monthly SWPS on the 20th.			
10/20/22	ToDo	10/20/22	Price, Tom	Email Dan to lift restrictions to send Monthly SWPS on the 20th. Sent 4,597.00 to pay his rent.			



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<b>Price, Tom</b>
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<b>Completed Activities from January 01, 2021 thru April 06, 2023</b>
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List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
10/19/22	Note	10/19/22	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Email: FA/BOA Out of Office --- Email baby announcement 10/19/22			
10/14/22	ToDo	10/17/22	Price, Tom	Make sure transfer took place.			
10/14/22	ToDo	10/14/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month. Move \$7,912.50 from his Select IRA 92590560 to his Trust 92525200			
10/11/22	ToDo	04/18/23	PRICE, TOM & HELEN (Trust Acco 92525200)	6 Month Call			
10/08/22	Note	10/08/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) email to warwgn@outlook.com			
09/28/22	Call	09/28/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Wed, 28-Sep-2022 9:56am (FA, BD): Tried to contact Tom twice, phone was busy both times.			
09/28/22	Call	09/28/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Wed, 28-Sep-2022 9:24am (FA, BD): Tried to call Tom to talk about tax docs. Phone line was busy.			
09/23/22	Appt-In Off	09/22/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Tentative call			
09/21/22	CBk	09/21/22	Price, Tom	Tom called and has some questions. Can you please call him back?			
09/21/22	Note	09/21/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Activity in Your Account (NC_R)			
09/21/22	Call	09/21/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Wed, 21-Sep-2022 10:24am (FA, BD): Tried to call Tom- phone rang. Let phone ring until it started a busy signal.			

### Relationship Activities And Notes

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**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
09/21/22	Call	09/21/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Wed, 21-Sep-2022 8:57am (FA, BD): Tried to call Tom. The line was busy.			
09/20/22	ToDo	09/20/22	PRICE, TOM & HELEN (Trust Acco 92525200)	*** RECURRING ACTIVITY EXPIRES TODAY ***Email Dan to lift restrictions to send Monthly SWPS on the 20th.			
09/20/22	ToDo	09/20/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Email Dan to lift restrictions to send Monthly SWPS on the 20th.			
09/19/22	Note	09/19/22	Price, Tom	No WordPower letter sent on 9/19 to announce Forbes Recognition.			
09/19/22	CBk	09/15/22	PRICE, TOM & HELEN (Trust Acco 92525200)	**FYI** Thu, 15-Sep-2022 1:54pm (Tailored BOA Support, Crawford,Debbie): Terry Kuhn was returning your call from yesterday			
09/19/22	ToDo	09/15/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	Distribution and Tax Withholdings reinvested. Make sure one transfer was made to trust account.			
09/19/22	Note	09/19/22	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Letter: Forbes Next-Gen Ranking 2022 --- WordPower: Top Next-Gen Best in State 2022	Administrative		
09/19/22	ToDo	09/19/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Make sure money has been transferred back.			
09/16/22	Note	09/16/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560)	Home Office Correspondence: Activity in Your Account (NC_FALTR)			
09/16/22	CBk	09/15/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Thu, 15-Sep-2022 1:54pm (Tailored BOA Support, Crawford,Debbie): Terry Kuhn was returning your call from yesterday			

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**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
09/16/22	CBk	09/15/22	PRICE, TOM & HELEN (Trust Acco 92525200	**FYI** Thu, 15-Sep-2022 1:54pm (Tailored BOA Support, Crawford,Debbie): Terry Kuhn was returning your call from yesterday			
09/16/22	ToDo	09/15/22	PRICE JR, TOM IRA (EDJ IRA Ac 92590560	Email Dan to get restrictions removed so TASC can be sent out on the 15th of every month.			
09/15/22	Appt-Review	09/14/22	PRICE, TOM & HELEN (Trust Acco 92525200	Reschedule per FSD, Dan, wait for letter. Annual Review	Retirement		
09/13/22	Appt-Phone	09/12/22	PRICE, TOM & HELEN (Trust Acco 92525200	Phone call with Jeff and Tom. Per Dan at FSD, I can disclose information on call as long as Tom approves.			
09/09/22	Note	09/09/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective Newsletter (ST) email to warwgn@outlook.com			
09/02/22	ToDo	08/29/22	Price, Tom	Postcard: Annual Review 9/14 at 9:30			
09/01/22	Call	09/01/22	PRICE, TOM & HELEN (Trust Acco 92525200	Thu, 01-Sep-2022 5:17pm (FA, BD): Talked to Terri on August 31 in AM. She wanted to let me know she is filing an order of protection with KS Dept of Children and Family Services on behalf of her dad against Jeff. I called FSD, Dan Cox to let him know about situation.			
08/30/22	Call	08/29/22	PRICE, TOM & HELEN (Trust Acco 92525200	Call placed on Aug 29 around 12:40 PM to Tom. I called Tom to let him know we had received a POA document and ask if we had permission to add it to his account. He did not pick up. His phone does not have a VM.			

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Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
08/29/22	Call	08/29/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Mon, 29-Aug-2022 12:40pm (FA, BD): After talking with Dan (client protection FSD), I called Teresa. I let her know that I could not reveal any titling info. I walked through how a POA could be added to an account at EJ and that it requires either client permission or a letter of incapacitation.			
08/26/22	Note	08/26/22	PRICE, TOM 529 KELLEDther Acco 92529413	Home Office Correspondence: Confirming your account's goal			
08/26/22	Note	08/26/22	PRICE, TOM 529 MEGANther Acco 92529415	Home Office Correspondence: Confirming your account's goal			
08/26/22	Appt-In Off	08/25/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Call with Tom and Jeff			
08/26/22	Appt-In Off	08/25/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Phone call with Teresa			
08/23/22	Note	08/23/22	Price, Tom	Brooke had phone conversation with Jeff and Tom and they want to gift 3.5 million to Jeff. Brooke asked Tom if he wanted to complete this gifting action and he stated Yes. Brooke asked if they could wait for the meeting with Attorney on August 30th and they want to continue with gifting sooner than later. They were not sure what accounts to pull money from and they gave accountant information. Explained to them they would have to figure out the progress of following through with request and will return their call when known. Tom stated he did not want to share information with his daughter, Theresa at this time. MS			
08/23/22	Note	08/23/22	Price, Tom	Theresa called in and Megan spoke with her. She stated that her dad was confused about the conversation yesterday and that she wanted to talk about it so she could help him understand what was going on.			

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08/23/22	Appt-In Off	08/22/22	Price, Tom	Requested Appt.			
08/22/22	Call	08/22/22	PRICE, TOM & HELEN (Trust Acco 92525200	Mon, 22-Aug-2022 4:33pm (FA, BD): Talked to Tom. He gave permission to send POA summary form to attorney Maggie. I explained that now that we know POA exists that we need to get information, preferably have attorney fill out (per conversation with Mike E. FSD). I suggested that the family (both son and daughter) meet together for Aug 30 meeting. Tom requested I call and discuss this conversation with Jeff.			
08/22/22	Note	08/22/22	PRICE, TOM & HELEN (Trust Acco 92525200	After Tom gave permission (Aug 22 at 4:33 pm) to talk with Jeff, I (Brooke, FA) called Jeff and let him know that Tom gave permission to fax POA summary form to attorney Maggie. I explained that now that we know POA exists that we need to get information, preferably have attorney fill out (per conversation with Mike E. FSD). I suggested the family (both son and daughter) meet together for Aug 30 meeting.			

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08/22/22	Note	08/22/22	Price, Tom	8/22/22: Brooke met with Jeff and Tom in office. Tom gave permission to share all financial information with Jeff. They discussed wanting to gift 3.5 million from Tom to Jeff. We went over each acct that Tom has and holdings in each. Talked about how he is taking money out of his traditional IRA it would create unordinary income and if he moves money from his trust acct that cost basis goes with it. Discussed on ROTH how is grow tax deferred and comes out tax free. Suggested involve an acct and attorney. They state their was a durable POA that daughter Theresa was that person. This POA was signed 6 months after Tom's wife death, Helen. At that point they decided they have an appt with attorney on August 30st and requested that Brooke be on call. Tom gave permission to fax holdings pages, beneficiaries to attorney Maggie. No action should be taken at this time. MS			
08/18/22	Note	08/18/22	PRICE JR, TOM ROTH (Roth IRA 92696230	Account Verification Letter: New Account, Significant Change or Every Three Year			
08/15/22	ToDo	08/15/22	Price, Tom	Postcard: Annual Review 9/14 at 9:30			
08/12/22	Note	08/12/22	PRICE, TOM & HELEN (Trust Accto 92525200	Home Office Correspondence: Confirming your goal's Portfolio Objective			

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List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
08/11/22	Call	08/11/22	PRICE, TOM & HELEN (Trust Accto 92525200)	Thu, 11-Aug-2022 5:13pm (FA, BD): Talked to Tom, son Jeff, and daughter Terry. Tom gave permission to talk to everyone openly about his finances. He was concerned about the performance/drop in his account. He wanted to know how he could move from med-high risk to low risk. I explained that we could do exchanges in mutual funds from stock funds to bond funds, which would not cause taxes or create fees. Tom said he was considering moving all investments in money market. We discussed BTG, BTG&I, and BTI model portfolios- we discussed how he would still have ups and downs in each of these models. We discussed exchanging into Am Funds mrrkt or selling into EJ mrrkt. I suggested between the two I would exchange into Am Funds mrrkt to avoid any possible fees/CDSC if he wanted to reinvest in the future. I recommended Tom stay invested in the stock market but reduce his risk by moving 10% of his money out of stocks per his concern (from 60% stocks->50% stocks) by doing exchanges. Then in the future, we could do more exchanges to make him more conservative over time. We discussed his performance over the long term. We discussed how EJ has a long term investment philosophy and we would consider a move into mrrkt and out of mrrkt to be timing the market, which EJ does not recommend. Tom is most concerned about his Roth account (more aggressive- GF). We discussed how I would create proposal that Jeff would pick up tomorrow. They wanted to think about any action before making any trades.			
08/11/22	CBk	08/11/22	Price, Tom	Jeff Price called and requested you call him when you have a minute. He would not give me a reason after I asked. 224-542-9588			

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
07/25/22	Note	07/25/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Change to a Service on Your Account (NC_SC)			
07/11/22	Note	07/11/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Service Set Up on Your Account (NC_S)			
07/09/22	Note	07/09/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Mthly-Jul/Aug) (ST) email to warwgn@outlook.com			
07/01/22	Note	07/01/22	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Email: FA / BOA Out of Office --- Brooke out of office 7/4-7/11/22. Emailed 7/1/22			
06/30/22	Note	06/30/22	PRICE JR, TOM IRA (EDJ IRA Ac 92590560)	Home Office Correspondence: Service Set Up on Your Account (NC_F1_R)			
06/29/22	Note	06/29/22	PRICE JR, TOM IRA (EDJ IRA Ac 92590560)	WordPower Letter: Admin. Forms/Documents Cover Notes --- WordPower: Recurring payment/Retirement Distribution Auth			
06/28/22	Note	06/28/22	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Email: American Funds Seminars - BOA --- WordPower: Email Invitation to Am. Funds Seminar on July 14, 2022.			
06/07/22	Note	06/07/22	PRICE, TOM & HELEN (Trust Acco 92525200)	American Funds Seminar July 14 invite (used Hallmark invite)			
06/04/22	Note	06/04/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to warwgn@outlook.com			
05/21/22	Note	05/21/22	PRICE JR, TOM IRA (EDJ IRA Ac 92590560)	Home Office Correspondence: Activity in Your Account (NC_FALT)			
05/20/22	Note	05/20/22	PRICE, TOM & HELEN (Trust Acco 92525200)	Address Verification Letter: Address / Name Change			



### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
05/20/22	Note	05/20/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Address Verification Letter: Address / Name Change			
05/20/22	Note	05/20/22	PRICE JR, TOM ADV IREDJ IRA Ac 92588167	Address Verification Letter: Address / Name Change			
05/20/22	Note	05/20/22	PRICE, TOM 529 KELLEDther Acco 92529413	Address Verification Letter: Address / Name Change			
05/20/22	Note	05/20/22	PRICE JR, TOM ROTH (Roth IRA 92696230	Address Verification Letter: Address / Name Change			
05/20/22	Note	05/20/22	PRICE, TOM 529 MEGANOther Acco 92529415	Address Verification Letter: Address / Name Change			
05/20/22	Note	05/20/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Letter: Admin. Forms/Documents Cover Notes --- View & Share Auth form for Online Access 5/20/22			
05/20/22	ToDo	05/20/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Tom's RMD shortfall done?			
05/19/22	Call	05/19/22	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	Thu, 19-May-2022 10:50am (FA, BD): LM for Jeff to CB with Tom.			
05/16/22	Note	05/16/22	PRICE, TOM & HELEN (Trust Acco 92525200	Per Mike Eisenbath, if Tom doesn't have a computer, he cannot be set up for Account Access to get his statements electronically. EJ has to have a guaranteed way for the client to get statements so since Tom doesn't have a computer, he would not be able to access statements electronically. He would need to receive statements in paper form. kn			
05/12/22	Note	05/12/22	PRICE JR, TOM ADV IREDJ IRA Ac 92588167	Home Office Correspondence: Advisory Solutions Brochure Changes Client Letter			

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
05/12/22	Note	05/12/22	PRICE, TOM & HELEN (Trust Acco 92525200	Spoke with Jeff Price. Told Jeff that Tom would have to approve changing his mailing address to South Dakota and if he did, we also need to set Jeff up as interested party. South Dakota address would receive duplicate copies of monthly statements and trade confirms. Jeff also mentioned an account for Kelly Mc Lees where Helen is still receiving duplicate statements. I told Jeff that Kelly would need to call her current advisor to get Helen removed as interested party if that's what Kelly wants to happen.kn			
05/12/22	Note	05/12/22	PRICE, TOM & HELEN (Trust Acco 92525200	Spoke with Mike Eisenbath. Mike said we could change Tom's mailing address to be Jeff's South Dakota address if we got verbal permission from Tom that he was comfortable with that. If Tom's mailing address becomes South Dakota, Brooke will need to be licensed in South Dakota (she already is) and we would have to add Jeff as interested party. The South Dakota address would receive two copies of statements (one from interested party and one from Tom's mailing address.) kn			
05/07/22	Note	05/07/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to warwgn@outlook.com			
04/27/22	Note	04/27/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Email: Message from Edward Jones --- Market Pulse: Growth Concerns Overshadow Fundamentals 4/27/22			
04/26/22	Note	04/26/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Letter: KC Night at the Ballpark --- 2022 Royals Day at the K 4/26/22			
04/14/22	Call	04/14/22	PRICE, TOM & HELEN (Trust Acco 92525200	Birthday Call: Helen 4/14. Have Brooke Call			

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
04/08/22	Call	03/31/22	PRICE, TOM & HELEN (Trust Acco 92525200	6 Month Call			
04/07/22	Note	04/07/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to warwgn@outlook.com			
04/07/22	Note	04/07/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Letter: Money Due --- Goldman Sachs Bk \$110,000 4/8/22			
03/24/22	CBk	03/23/22	Price, Tom	Real Estate Attorney referral???? He is selling his house by owner. His daughter Terri Kuhn call 967-9328 Called and LVM with Terri. Referred Pete Heaven			
03/10/22	Note	03/10/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Email: Market Pulse update: Markets Wrestle with a Commodity Price Shock - Our Take on Its Impact --- Markets wrestle with commodity price shock-our take on its impact 3/10			
03/04/22	Note	03/04/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to warwgn@outlook.com			
02/24/22	Note	02/24/22	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Email: Market Pulse update: Geopolitical tensions added to near-term uncertainty --- Weekly Market Wrap re Ukraine emailed 2/24/22			
02/07/22	Call	02/07/22	PRICE, TOM & HELEN (Trust Acco 92525200	Birthday Call: Tom 2/7. Have Brooke call			
02/04/22	Note	02/04/22	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to warwgn@outlook.com			
01/20/22	Note	01/20/22	PRICE JR, TOM IRA (EDJ IRA Ac 92590560	WordPower Letter: Money Due --- State Bk India \$60000 1/26/22			

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
List sorted by Completion Date and Time							
Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
01/11/22	Note	01/11/22	PRICE, TOM 529 KELLEOther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to warwgn@outlook.com			
12/09/21	Note	12/09/21	PRICE JR, TOM IRA (CEDJ IRA Ac 92590560	WordPower Letter: Money Due --- Wells Fargo Bk \$63000 12/14/21			
12/04/21	Note	12/04/21	PRICE, TOM 529 KELLEOther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to warwgn@outlook.com			
12/03/21	ToDo	12/01/21	PRICE, TOM & HELEN (Trust Acco 92525200	rqst'd 11/2 Have Jim Easley's office request II for Hartford Life Policy that Kids have. Glitch in system in 2016. Possibly try to talk them through doing the II on their own system? Emailed Jim's BOA 12/3			
11/24/21	CBk	11/24/21	Price, Tom	Wed, 24-Nov-2021 11:58am (FA, BD): Talked to Jeff. He thinks Tom might be moving or trying out Cedar Village. He said Tom might call to make sure he has enough money to pay for the expenses every month. Jeff stated that it would be around \$4,000 a month which would include everything. Jeff Price called on behalf of his father. Needs 3 minutes of your time. He left a voicemail and didn't give any more detail			
11/06/21	Note	11/06/21	PRICE, TOM 529 KELLEOther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to warwgn@outlook.com			
11/04/21	Note	11/04/21	PRICE, TOM 529 MEGANOther Acco 92529415	Account Verification Letter: New Account, Significant Change or Every Three Year			
11/01/21	CBk	11/01/21	Price, Tom	Call Maggie Fisher 816-853-5908 is her cell. She was working from home on Friday.			

## Relationship Activities And Notes

All figures effective as of print date

Price, Tom

Completed Activities from January 01, 2021 thru April 06, 2023							
List sorted by Completion Date and Time							
Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
10/14/21	Note	10/14/21	PRICE JR. TOM IRA (EDJ IRA Ac 92590560	Home Office Correspondence: Activity in Your Account (NC_FALT)			
10/14/21	Note	10/14/21	PRICE, TOM 529 KELLEther Acco 92529413	Account Verification Letter: New Account. Significant Change o r Every Three Year			
10/13/21	Note	10/13/21	PRICE, TOM & HELEN (Trust Acco 92525200	Home Office Correspondence: Confirming your goal's Portfolio O bjective			
10/13/21	Note	10/13/21	Price, Tom	10/11/2021: Had Zoom meeting with Tom and Jeff. Reviewed RTQ and Portfolio: BTG at 62% in 2021 and decreased to 61% in 2021 . Tom was fine with leaving account more aggressive. We disc ussed ways he could become more conserv. Updated NW=\$8.124K a nd ARA. Concerned about estate taxes-Jeff will research/ask a tty if they filed for portability. Discussed RMD-Take remaini ng in shares and for taxes. Jeff has a new job at Commerce Tr ust. Will consider moving 529 to grandkids. MS			
10/12/21	CBk	10/12/21	PRICE JR. TOM ROTH (Roth IRA 92696230	Reached out via email in regards to moving his father from his granddaughters account. Can you please call him Tue. 12-Oct-2021 8:53am (B0A, MS):			
10/12/21	Note	10/12/21	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Letter: Generic Cover Letters --- NW, ARA 10/12/21			
10/12/21	Appt-Review	10/11/21	PRICE, TOM & HELEN (Trust Acco 92525200	done Called and LVM 10/8: confirmed Annual ZOOM Review			
10/11/21	MDue	09/01/21	PRICE, TOM & HELEN (Trust Acco 92525200	3.50% MC PHERSON CNTY KANS UNI SCH D REFUNDING & IMPROVEMENT		09/01/21	\$15,000
10/08/21	Note	10/08/21	PRICE, TOM 529 KELLEther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) ema il to warwgn@outlook.com			

### Relationship Activities And Notes

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**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
10/08/21	Call	10/08/21	PRICE JR, TOM ROTH (Roth IRA 92696230)	Send zoom link for Tom Price annual review and email both Tom and Jeff for zoom invite.			
10/08/21	ToDo	10/11/21	PRICE JR, TOM ROTH (Roth IRA 92696230)	Send zoom link for appointment at 9:30			
09/20/21	Call	09/10/21	Price, Tom	Annual Review ok?			
09/07/21	CBk	09/07/21	PRICE JR, TOM IRA (EDJ IRA Ac 92590560)	Tue, 07-Sep-2021 11:38am (BOA, MS): Called to reinvest money dues			
09/04/21	Note	09/04/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Sep) (ST) email to warwgn@outlook.com			
08/25/21	Note	08/25/21	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Letter: Money Due --- McPherson Cnty Kans Uni Sch \$15,000.00 9/1/21			
08/07/21	Note	08/07/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Aug) (ST) email to warwgn@outlook.com			
07/28/21	Note	07/28/21	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Letter: Introduce BOA/BOA Retires --- BOA Julie leaving, new BOA Megan starting 7/28/21			
07/07/21	Note	07/07/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jul) (ST) email to warwgn@outlook.com			
07/01/21	ToDo	07/01/21	PRICE, TOM & HELEN (Trust Acco 92525200)	make sure address monthly statements were mailed to is Tom's & not Megan's.			
06/24/21	Note	06/24/21	PRICE JR, TOM IRA (EDJ IRA Ac 92590560)	WordPower Letter: Admin. Forms/Documents Cover Notes --- IRA withholding election (chg KS tax) 6/24/21			

### Relationship Activities And Notes

All figures effective as of print date

**Price, Tom**

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
06/16/21	CBk	06/15/21	PRICE, TOM & HELEN (Trust Acco 92525200)	Wed, 16-Jun-2021 10:57am (FA, BD): Talked to Jeff and Tom. He (tom) wanted to purchase some tf bond funds. We discussed upfr ont fee and CDSC. Tue, 15-Jun-2021 4:17pm (FA, BD): LM to CB 6/16 10:45 224-542-9588. Jeff retd call. Call Jeff & he'll ge t Tom on the phone. kn 6/15 3:30 856-6393. Tom wants to put \$9 0000 mmkt into a mutual fund. I spoke to Tom & Jeff & ACHd \$19 914 to bank and the rest of mmkt goes into mfd. kn			
06/16/21	MDue	06/14/21	PRICE, TOM & HELEN (Trust Acco 92525200)	2.50% MORGAN STANLEY BK N A SALT CERTIFICATE OF DEPOSIT SEMI-ANNUA		06/14/21	\$40,000
06/16/21	ToDo	06/16/21	PRICE, TOM & HELEN (Trust Acco 92525200)	\$19914.57 ach?			
06/15/21	Note	06/15/21	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Activity in Your Account (NC_DS)			
06/10/21	Note	06/10/21	PRICE, TOM & HELEN (Trust Acco 92525200)	Home Office Correspondence: Activity in Your Account (NC_DS)			
06/10/21	Note	06/10/21	PRICE, TOM & HELEN (Trust Acco 92525200)	WordPower Letter: Money Due --- Morgan Stanley Bk \$40000 6/14/21			
06/10/21	CBk	06/10/21	PRICE, TOM & HELEN (Trust Acco 92525200)	6/10/21 I spoke to Tom & he wanted this money due sent to his bank - he may buy a new tractor. kn 6/9 1:50 856-6393. Tom re \$\$ due. kn			
06/10/21	MDue	06/04/21	PRICE, TOM & HELEN (Trust Acco 92525200)	6/10/21 per Tom, ACH this money to his bank///2.65% GOLDMAN S ACHS BK USA NEW YORK CERTIFICATE OF DEPOSIT		06/04/21	\$20,000
06/05/21	Note	06/05/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) ema il to warwgn@outlook.com			

## Relationship Activities And Notes

All figures effective as of print date

Price, Tom

## Completed Activities from January 01, 2021 thru April 06, 2023

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
06/03/21	Note	06/03/21	PRICE, TOM & HELEN (Trust Acco 92525200	WordPower Letter: Money Due --- Goldman Sachs Bk \$20000 6/4/21			
05/18/21	CBk	05/18/21	PRICE, TOM & HELEN (Trust Acco 92525200	5/18 3:35 856-6393. Tom retd your call. kn Tue, 18-May-2021 2:57pm (FA, BD): LM for him to cb. 5/18 1:00 856-6393. Tom wants to talk about the stock market. kn			
05/08/21	Note	05/08/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to warwgn@outlook.com			
04/07/21	Call	03/31/21	PRICE, TOM & HELEN (Trust Acco 92525200	6 mo call			
04/06/21	Note	04/06/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to warwgn@outlook.com			
03/06/21	Note	03/06/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to warwgn@outlook.com			
03/01/21	ToDo	02/24/21	PRICE JR, TOM ADV IREDJ IRA Ac 92588167	Advisory rebal began today. no activity until 3/1			
02/05/21	Note	02/05/21	PRICE, TOM 529 KELLEDther Acco 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to warwgn@outlook.com			
02/05/21	Call	02/05/21	PRICE, TOM & HELEN (Trust Acco 92525200	Tom's bday is 2/7			
01/25/21	CBk	01/25/21	PRICE, TOM & HELEN (Trust Acco 92525200	Mon, 25-Jan-2021 11:52am (FA, BD): Talked Tom and he wanted to invest \$80k in Am funds bond funds. 1/25 9:20 856-6393. Tom re \$\$ due. kn			
01/25/21	MDue	01/19/21	PRICE, TOM & HELEN (Trust Acco 92525200	2.75% CITIBANK NATL ASSN SIOUX FALLS CERTIFICATE OF DEPOSIT		01/19/21	\$30,000



### Relationship Activities And Notes

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**Price, Tom**

Completed Activities from January 01, 2021 thru April 06, 2023							
List sorted by Completion Date and Time							
Completion Date	Type	Activity Date	Name	Description	Need	Maturity Date	Amount
01/15/21	CBk	01/15/21	Price, Tom	1/15/21 1:14 Pls call Jeff re accountant 224-542-9588			
01/15/21	Note	01/15/21	PRICE, TOM & HELEN (Trust Accto 92525200	WordPower Email: T. Rowe Price Speaking of Markets - BOA --- E mail invite to T Rowe Price seminar 1/15/21			
01/14/21	Note	01/14/21	PRICE, TOM 529 KELLEDther Accto 92529413	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to warwgn@outlook.com			
01/14/21	Note	01/14/21	PRICE, TOM & HELEN (Trust Accto 92525200	WordPower Letter: Money Due --- Citibank \$30000 1/19/21			
01/07/21	ToDo	01/05/21	Price, Tom	12/30 remailed 12/15 mailed LOA SWPS Restart Autocalc Swps Starting Jan 15			
01/06/21	Note	01/06/21	PRICE JR, TOM IRA (CEDJ IRA Accto 92590560	Cash Negative Confirm Letter: NC_E			