

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

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Description	Need	Maturity Date	Amount
05/20/22	ToDo	05/20/22	Tom's RMD shortfall done?			
05/19/22	Call	05/19/22	Thu, 19-May-2022 10:50am (FA, BD): LM for Jeff to CB with Tom.			
01/20/22	Note	01/20/22	WordPower Letter: Money Due ... State Bk India \$60000 1/26/22			
12/09/21	Note	12/09/21	WordPower Letter: Money Due ... Wells Fargo Bk \$63000 12/14/21			
10/14/21	Note	10/14/21	Hone Office Correspondence: Activity in Your Account (NC_FALT)			
09/07/21	CBk	09/07/21	Tue, 07-Sep-2021 11:38am (BOA, MS): Called to reinvest money dues			
06/24/21	Note	06/24/21	WordPower Letter: Admin. Forms/Documents Cover Notes ... IRA withholding election (chg KS tax) 6/24/21			
01/06/21	Note	01/06/21	Cash Negative Confirm Letter: NC_E			



Figure 2: Notes from 92590560 (Brook shows that she had no issues working with Jeff)