

## Contact Activities and Notes

All figures effective as of print date

**PRICE JR, TOM IRA (O)**

FBO THOMAS J PRICE JR IRA

EDJ IRA Account

92590560

EDWARD D JONES &amp; CO CUSTODIAN

PO BOX 13304

OVERLAND PARK, KS 66282-3304

(913)390-0674 (H) (P)

No phone number given (W)

(913)642-5860

Call Preference: Morning

### 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
02/16/23	Note	02/16/23	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 an annual review if he becomes the permanent conservator. MS			