### **Contact Activities and Notes**

PRICE, MEGAN, TOM
THOMAS J PRICE JR
Joint Account
92523145
8113 W 85TH ST
OVERLAND PARK, KS 66212-2829

No phone number given (W) (913)709-0081 (P) (913)856-6393 (H)

List sorted b	List sorted by Completion Date and Time	List sorted by Completion Date and Time	ime		
Completion Type Date	Туре	Activity Date	Description	Maturity Amount Date	Amount
03/29/23	Note	03/29/23	WordPower Email: VOC - Client Relationship Survey Email Voice of Client Survey letter emailed 3/29/233		
03/13/23	Note	03/13/23	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	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.cc@gmail.com		
02/03/23	Note	02/03/23	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.cc@gmail.com		
01/10/23	Note	01/10/23	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.cc@gmail.com		
12/06/22	Note	12/06/22	12/06/22 NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.cc@gmail.com		
11/05/22	Note	11/05/22	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to meganprice.cc@gmail.com		
10/19/22	Note	10/19/22	10/19/22 WordPower Email: FA/BOA Out of Office ··· Email baby announcement 10/19/22		
10/08/22	Note	10/08/22	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) email to meganprice.cc@gmail.com		
09/19/22	Note	09/19/22	09/19/22 WordPower Letter: Forbes Next-Gen Ranking 2022 WordPower: Top Next-Gen Best in State 2022   Administrative		
09/19/22	Note	09/19/22	09/19/22 WordPower Letter: Forbes - Best-in-State Wealth Adv 2022 WordPower: Top Next Gen Wealth Ad Administrative visors-Best in State 2022		
09/09/22	Note	09/09/22	NEWSLETTER Edward Jones Perspective Newsletter (ST) email to meganprice.cc@gmail.com		
09/07/22	ToDo	09/07/22	Once PG trade settles (place 9/1 amrkt, should settle 9/7), send exact proceeds to bank on file once AFCXX trade settles (place 9/1 amrkt, should settle 9/6), send exact proceeds to bank on file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her a cocount. She wanted to have some of cash sent to bank on file. Once trades settle, send proceed so to bank. She wants to leave \$250 in cash in the account.		
09/07/22	ToDo	09/07/22	Last transfer was made. Left \$250 in account. Once AFCXX trade settles (place 9/1 amrkt, shou ld settle 9/6), send exact proceeds to bank on file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her account. She wanted to have some of cash sent to b ank on file. Once trades settle, send proceeds to bank. She wants to leave \$250 in cash in the account.		

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Completion Type Date	Туре	Activity Date	Description	Maturity Amount Date
5/22	Note	09/06/22	Home Office Correspondence: Activity in Your Account (NC_DS)	
	Call	09/01/22	Thu. 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her account. She wanted to have some of cash sent to bank on file. Once trades settle, send proceeds to bank. She wants to leave \$250 in cash in the account.	
09/01/22	Call	09/01/22	Thu, 01-Sep-2022 4:03pm (FA, BD): Talked to Megan and her aunt Terri (with Megan's permission). Rediscussed items from Tuesday: After talking to Dan (FSD). I let Megan know that we are able to take instructions from her on the account (trading) and that we are able to follow her in structions for money requests (ACH already on file). Money requests in check form would be mad e out to both Megan and Tom. I let her know registration changes cannot be done at this time a s we would require a doctor's letter to proceed. At this time, we would not be able to take an y instructions from Tom until we receive a doctor's letter.	
08/30/22	Call	08/30/22	Tue, 30-Aug-2022 12:51pm (FA, BD): Talked to Megan. She was wondering what actions could be ta	
		14444	ions from her on the account (trading) and that we are able to follow her instructions for mon ey requests (ACH already on file). Money requests in check form would be made out to both Mega n and lom. I let her know registration changes cannot be done at this time as we would require a doctor's letter to proceed. At this time, we would not be able to take any instructions from until we receive a doctor's letter. She gave permission to add an account alert on this account for all calls to be referred to branch.	
08/26/22	Call	08/26/22	1	
07/09/22	Note	07/09/22	NEWSLETTER Edward Jones Perspective (Mthly-Jul/Aug) (ST) email to meganprice.cc@gmail.com	The state of the s
07/01/22	Note	07/01/22	WordPower Email: FA / BOA Out of Office Brooke out of office 7/4-7/11/22. Emailed 7/1/22	
06/04/22	Note	06/04/22	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.cc@gmail.com	
05/07/22	Note	05/07/22	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.cc@gmail.com	
04/27/22	Note	04/27/22	WordPower Email: Message from Edward Jones Market Pulse: Growth Concerns Overshadow Funda mentals 4/27/22	
04/21/22	Note	04/21/22	Account Verification Letter: New Account, Significant Change or Every Three Year	
04/20/22	Note	04/20/22	Home Office Correspondence: Confirming a change to your account's goal	
04/19/22	Note	04/19/22	WordPower Letter: Admin. Forms/Documents Cover Notes	

# **Contact Activities and Notes**

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> (913)856-6393 (H) No phone number given (W) (913)709-0081 (P)

Completion Type	l ict corted h	list sorted by Completion Date and Time	T bat att	mo			
3/22 Call 04/18/22 Mon. 18-Apr-2022 12:46pm (FA, BD): Spoke to Megan. She w trades would create cap gains.  04/18/22 Mon. 18-Apr-2022 12:36pm (FA, BD): LM for Megan to CB r 04/15/22 Note 04/15/22 Home Office Correspondence: Confirming your goal's Port 1/22 Note 04/14/22 confirmed Annual Review. Kn 10/18/22 Month Call  11/22 Sentemail: Market Pulse update: Markets Wrestle w on Its Impact Markets wrestle with commodity price on Its Impact Market wrestle wrestle with commodity price on Its Impact Market wrestle wrestle with commodity price on Its Impact Market wrestle wrestle with commodity price on Its Impact Market Wrestle wrestl	Completion Date	Туре	Activity Date	Description		Maturity A Date	Amount
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Note         02/04/22           Note         01/11/22           Note         12/04/21           Note         11/06/21           Note         10/08/21           Note         09/04/21           Call         08/27/21           Note         08/07/21           Note         07/28/21           Note         07/07/21           Note         05/08/21           Note         05/08/21           Note         04/06/21	02/24/22	Note		WordPower Email: Market Pulse update: Geopolitical tensions add to near-term uncertainty Weekly Market Wrap re Ukraine emailed 2/24/22			
Note         01/11/22           Note         12/04/21           Note         11/06/21           Note         10/08/21           Note         09/04/21           Call         08/27/21           Note         08/07/21           Note         07/28/21           Note         07/07/21           Note         05/08/21           Note         05/08/21           Note         04/06/21	02/04/22	Note		Edward Jones Perspective (Monthly-Feb) (ST) email to			
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Note     11/06/21       Note     10/08/21       Note     09/04/21       Call     08/27/21       Note     08/07/21       Note     07/28/21       Note     07/07/21       Note     05/08/21       Note     05/08/21       Note     04/06/21	12/04/21	Note	<u> </u>	Edward Jones Perspective (Monthly-Dec) (ST) email to			
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Completion Type	Туре	Activity	Activity Description	Need	Maturity Amount
3	NI_F	00 /04 /01	00/04/01 Address Verification Latter T Dallings Verification Latter		
03/15/21	Call	03/12/21 6 mo cal	6 mo call		
03/06/21	Note	03/06/21	03/06/21 NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.cc@gmail.com		
02/05/21	Note	02/05/21	02/05/21 NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.cc@gmail.com		
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