

All figures effective as of print date

### Contact Activities and Notes

<p><b>PRICE, MEGAN, TOM</b>                  THOMAS J PRICE JR                  Joint Account                  92523145                  8113 W 85TH ST                  OVERLAND PARK, KS 66212-2829</p>	<p>(913)856-6393 (H)                  No phone number given (W)                  (913)709-0081 (F)                  Call Preference: Morning</p>
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**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
03/29/23	Note	03/29/23	WordPower Email: VOC - Client Relationship Survey Email --- Voice of Client Survey Letter email Ted 3/29/23			
03/13/23	Note	03/13/23	WordPower Email: Daily Market Snapshot - BOA --- Daily Market Snapshot re Stillicon Valley Bank failure emailed 3/13/23			
03/03/23	Note	03/03/23	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.ccf@gmail.com			
02/03/23	Note	02/03/23	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.ccf@gmail.com			
01/10/23	Note	01/10/23	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.ccf@gmail.com			
12/06/22	Note	12/06/22	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.ccf@gmail.com			
11/05/22	Note	11/05/22	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to meganprice.ccf@gmail.com			
10/19/22	Note	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.ccf@gmail.com			
09/19/22	Note	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	WordPower Letter: Forbes - Best-in-State Wealth Adv 2022 --- WordPower: Top Next Gen Wealth Advisors-Best in State 2022	Administrative		
09/09/22	Note	09/09/22	NEWSLETTER Edward Jones Perspective Newsletter (ST) email to meganprice.ccf@gmail.com			
09/07/22	Todo	09/07/22	Once Pq trade settles (place 9/1 amrkt, should settle 9/7), send exact proceeds to bank on file e Once AFCXX trade settles (place 9/1 amrkt, should settle 9/6), send exact proceeds to bank o n file. Thu, 01-Sep-2022 4:37pm (FA, BD): Talked to Megan. She wanted to place sells in her a ccount. She wanted to have some of cash sent to bank on file. Once trades settle, send proceed s 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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<p><b>PRICE MEGAN TOM</b>  <b>THOMAS J PRICE JR</b>                  Joint Account                  92523145                  813 W 85TH ST                  OVERLAND PARK, KS 66212-2829</p>	<p>(913)856-6393 (H)                  No phone number given (W)                  (913)709-0081 (P)                  Call Preference: Morning</p>
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### Completed Activities from January 01, 2021 thru April 06, 2023

Completion Date	Type	Activity Date	Description	Need	Maturity Date	Amount
09/06/22	Note	09/06/22	Home Office Correspondence: Activity in Your Account (NC DS)			
09/01/22	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 instructions for money requests (ACH already on file). Money requests in check form would be made out to both Megan and Tom. 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 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 taken on account. 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 instructions for money requests (ACH already on file). Money requests in check form would be made out to both Megan and Tom. 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 Tom 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	Birthday Call: Megan 8/28			
07/09/22	Note	07/09/22	NEWSLETTER Edward Jones Perspective (Monthly-Jul/Aug) (ST) email to meganprice.ccb@gmail.com			
07/01/22	Note	07/01/22	WordPower Email: FA / BOA Out of Office --- Brooke out of office 7/4-7/11/22. Emailled 7/1/22			
06/04/22	Note	06/04/22	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.ccb@gmail.com			
05/07/22	Note	05/07/22	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.ccb@gmail.com			
04/27/22	Note	04/27/22	WordPower Email: Message from Edward Jones --- Market Pulse: Growth Concerns Overshadow Fundamentals 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			

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### 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
04/18/22	Call	04/18/22	Mon, 18-Apr-2022 12:46pm (FA, BD): Spoke to Megan. She wanted to place trades. We discussed how trades would create cap gains.			
04/18/22	Call	04/18/22	Mon, 18-Apr-2022 12:36pm (FA, BD): LM for Megan to CB regarding making trades in her account			
04/15/22	Note	04/15/22	Home Office Correspondence: Confirming your goal's Portfolio Objective			
04/15/22	Appt-Review	04/14/22	confirmed Annual Review. kn			
04/07/22	Note	04/07/22	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to meganprice.ccf@gmail.com			
03/16/22	Call	10/18/22	6 Month Call			
03/10/22	Note	03/10/22	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	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.ccf@gmail.com			
02/25/22	Call	02/25/22	11/13 sent text message. 11/12 sent email 10/30 sent email 10/1 sent email 8/3 sent email asking again for appointment. 4/23/2020 updated Trusted Contact, wants appointment for after 6:00 or after 4:00 on weekends. 3/9 texted 11/18 texted. 11/8 sent msg back that she is too busy. I suggested a webex or phone call. 10/31 texted. sent email Confirm annual review			
02/24/22	Note	02/24/22	WordPower Email: Market Pulse update: Geopolitical tensions add to near-term uncertainty --- Weekly Market Wrap re Ukraine emailed 2/24/22			
02/04/22	Note	02/04/22	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.ccf@gmail.com			
01/11/22	Note	01/11/22	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.ccf@gmail.com			
12/04/21	Note	12/04/21	NEWSLETTER Edward Jones Perspective (Monthly-Dec) (ST) email to meganprice.ccf@gmail.com			
11/06/21	Note	11/06/21	NEWSLETTER Edward Jones Perspective (Monthly-Nov) (ST) email to meganprice.ccf@gmail.com			
10/08/21	Note	10/08/21	NEWSLETTER Edward Jones Perspective (Monthly-Oct) (ST) email to meganprice.ccf@gmail.com			
09/04/21	Note	09/04/21	NEWSLETTER Edward Jones Perspective (Monthly-Sep) (ST) email to meganprice.ccf@gmail.com			
08/27/21	Call	08/27/21	Megan's bday 8/28			
08/07/21	Note	08/07/21	NEWSLETTER Edward Jones Perspective (Monthly-Aug) (ST) email to meganprice.ccf@gmail.com			
07/28/21	Note	07/28/21	WordPower Letter: Introduce BOA/BOA Retires ... BOA Julie leaving, new BOA Megan starting 7/28/21			
07/07/21	Note	07/07/21	NEWSLETTER Edward Jones Perspective (Monthly-Jul) (ST) email to meganprice.ccf@gmail.com			
06/05/21	Note	06/05/21	NEWSLETTER Edward Jones Perspective (Monthly-Jun) (ST) email to meganprice.ccf@gmail.com			
05/08/21	Note	05/08/21	NEWSLETTER Edward Jones Perspective (Monthly-May) (ST) email to meganprice.ccf@gmail.com			
04/06/21	Note	04/06/21	NEWSLETTER Edward Jones Perspective (Monthly-Apr) (ST) email to meganprice.ccf@gmail.com			

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03/24/21	Note	03/24/21	Address Verification Letter: E-Delivery Verification Letter			
03/15/21	Call	03/12/21	6 mo call			
03/06/21	Note	03/06/21	NEWSLETTER Edward Jones Perspective (Monthly-Mar) (ST) email to meganprice.ccf@gmail.com			
02/05/21	Note	02/05/21	NEWSLETTER Edward Jones Perspective (Monthly-Feb) (ST) email to meganprice.ccf@gmail.com			
01/14/21	Note	01/14/21	NEWSLETTER Edward Jones Perspective (Monthly-Jan) (ST) email to meganprice.ccf@gmail.com			