

08/22/22	Note	08/22/22	Price, Tom	<p>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</p>
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