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“Draft”

EDWARD J. WHITE  
ATTORNEY AT LAW  
118 SOUTH ROYAL STREET  
ALEXANDRIA, VIRGINIA 22314

TELEPHONE 836-5444

April 10, 1986

Ms. JoAnn Barnes  
Bruner, Kane & McCarthy  
300 North Lee Street  
Alexandria, VA 22314

Re: Estate of Harold O'Connell

Dear JoAnn:

I have agreed with Anthony O'Connell's attorney that we will provide them with a draft of the final accounting in the Harold O'Connell Estate. This, I think, will allay all of the suspicions that have arisen on the other side in this matter.

If you could commence preparing that, I would appreciate it. I am enclosing a copy of the nearly signed Agreement, by which the Trustees agree to take possession of the percentage interest of the property.

Thank you.

Sincerely,

Edward J. White

EJW/mc

Enclosure

cc: Mrs. Jean O'Connell

COPY

EDWARD J. WHITE  
ATTORNEY AT LAW  
118 SOUTH ROYAL STREET  
ALEXANDRIA, VIRGINIA 22314

TELEPHONE 836-5444

April 25, 1986

Henry C. Mackall, Esquire  
4031 Chain Bridge Road  
Fairfax, VA 22030

Re: Estate of Harold M. O'Connell

Dear Mr. Mackall:

Enclosed is the draft by Ms. Barnes of the Final Accounting.

I have taken the liberty of correcting a typographical error on the distributions to reflect 53.9006% vice 3.9006%.

I would appreciate it if you would forward this to Mr. O'Connell and clarify with him his intention to qualify on May 1st.

If he does not agree or requests further delaying tactics, I feel that I have no other recourse in serving my client than to seek to have him removed as a Trustee. This matter is costing Mrs. O'Connell dearly with the delay.

Sincerely,



Edward J. White

EJW/mc

Enclosure

cc: Mrs. Jean O'Connell ✓

COPY

ESTATE OF HAROLD M. O'CONNELL  
(name of decedent, ward, etc.)

ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX  
(name of Personal Representative(s) and titles(s))

FIDUCIARY # \_\_\_\_\_

Number of this account Fourth and Final  
(1st, 2nd, third, etc.)

Covering period from January 1, 1985 to April 30, 1986  
(date) (date)

DESCRIPTION	ASSETS RECEIVED (or on hand)	DISBURSEMENTS
<b>ASSETS REMAINING ON HAND AT DECEMBER 31, 1984, PER THIRD ACCOUNT</b>		
One-half interest in residence and 3.3365 acres at 6541 Franconia Road, Springfield, Virginia	\$40,681.00	
One-half interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia	37,500.00	
Due to Jean M. O'Connell for net advances	<u>(775.52)</u>	
<b>TOTAL FOR WHICH TO ACCOUNT</b>	<b><u>\$77,405.48</u></b>	
<b>RECEIPTS:</b> None		
<b>EXPENSES PAID BY WIFE:</b>		
1985 real estate tax	\$ 2,642.01	
Third account filing fee	35.00	
Preparation of third account	325.00	
Fourth and final account filing fee (estimated)	<u>35.00</u>	
		\$ 3,037.01
<b>DISTRIBUTIONS:</b>		
Anthony M. O'Connell and Herbert Anderson Higham, Trustees u/w of Harold M. O'Connell:		
46.0994% interest in residence and 3.3365 acres at 6541 Franconia Road, Springfield, Virginia	\$37,507.39	
46.0994% interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia	<u>34,574.55</u>	
		72,081.94

**CLIENT'S DRAFT**  
For Review Purposes Only  
Subject To Change

Totals carried forward

\$77,405.48

\$75,118.95

ESTATE OF HAROLD M. O'CONNELL  
 (name of decedent, ward, etc.)

ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX FIDUCIARY # \_\_\_\_\_  
 (name of Personal Representative(s) and titles(s))

Number of this account Fourth and Final  
 (1st, 2nd, third, etc.)

Covering period from January 1, 1985 to April 30, 1986  
 (date) (date)

DESCRIPTION	ASSETS RECEIVED (or on hand)	DISBURSEMENTS
Totals brought forward	<u>\$77,405.48</u>	\$75,118.95
<b>DISTRIBUTIONS: (Continued)</b>		
Jean M. O'Connell:		
3.9006% interest in residence and 3.3365 acres at 6541 Franconia Road, Springfield, Virginia	\$ 3,173.61	
3.9006% interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia	2,925.45	
Due to Jean M. O'Connell for net advances	<u>(3,812.53)</u>	<u>2,286.53</u>
<b><u>TOTALS</u></b>	<u>\$77,405.48</u>	<u>\$77,405.48</u>
<b><u>ASSETS REMAINING</u></b>	<u>NONE</u>	

**CLIENT'S DRAFT**  
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Vouchers in support of said disbursements are submitted herewith.

Date: \_\_\_\_\_

\_\_\_\_\_  
 Jean M. O'Connell, Executrix

The appropriate vouchers and filing fee MUST accompany this account

ESTATE OF HAROLD M. O'CONNELL

COMPUTATION OF ASSETS TO BE TRANSFERRED TO RESIDUARY TRUST

PROBATE ASSETS:

1/2 interest - residence	\$ 40,681
1/2 interest - Accotink	37,500
605 shares, Washington Mutual	6,709
220 shares, New Virginia	1,953
Refund	5
Overpayment of Virginia tax	57
Cash	3,245
	<u>\$ 90,150</u>

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PAYABLE TO WIFE DIRECTLY:

Cash POD	\$ 16,541
Life insurance	14,918
Jointly owned property	13,902
Personal property	500
U. S. Civil Service	1,381
Annuity	16,338
	<u>\$ 63,580</u>

Gross estate per return	\$153,986
Funeral expenses, etc., per return	5,372
Net estate	<u>\$148,614</u>
Federal estate and Virginia inheritance tax	2,225
Net estate	<u>\$146,389</u>
Less property passing directly to wife	63,580
Net probate estate	<u>\$ 82,809</u>
Marital deduction	\$74,307
Less passing directly	<u>63,580</u>
	<u>10,727</u>
Residuary estate	<u>\$ 72,082</u>

ASSETS TO BE TRANSFERRED TO RESIDUARY TRUST:

Fractional interest in real estate:  
\$72,082/\$78,181 of 1/2 interest in  
real estate = 46.0994% ✓