

**False
Lost
Account**

Second Account

ESTATE OF HAROLD M. O'CONNELL

SECOND ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX
 COVERING PERIOD FROM MAY 26, 1977 TO DECEMBER 31, 1980

NO. # 21840
 DATE 6/18/77
 FILED 4/15/81
 PAID 2300
 TAPED ✓
 POSTED 5/4/81

PAGE 1

| Description | Assets received or on hand | Disbursements |
|----------------------------------------------------------------------------------------------|-------------------------------------|---------------|
| ASSETS REMAINING ON HAND AT MAY 26, 1977, PER FIRST ACCOUNT: | | |
| One-half interest in residence and 3.3365 a. at 6541 Manconia Road, Springfield, Virginia | \$40,681.00 | |
| One-half interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia | 37,500.00 | |
| 1210 Sh. Washington Mutual Investors Fund, Inc. | 6,709.45 | |
| 231 shares, New Virginia Bancorporation | 1,952.50 | |
| Northern Virginia Bank, checking account | 3,214.57 | |
| Personal books, clothing, etc. | 500.00 | |
| Due to Jean M. O'Connell for advances | (7,049.77) | |
| | \$83,507.75 ✓ | |

RECEPITS:

Dividends:

Washington Mutual Investors Fund, Inc.:

| | | |
|----------------------|------------|--|
| 5/20/77 capital gain | \$ 217.80 | |
| 5/20/77 | 145.20 | |
| 8/19/77 | 86.87 | |
| 11/18/77 | 86.87 | |
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| | 1,938.12 ✓ | |

New Virginia Bancorporation:

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| 7/14/77 | \$ 23.10 | |
| 10/15/77 | 23.10 | |
| 1/16/78 | 31.30 | |
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| | 429.40 ✓ | |

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

BOOK 298 PAGE 135
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| <u>RECEIPTS: (Continued)</u> | | |
| <u>Interest:</u> | | |
| Washington-Lee Savings & Loan Assoc.: | | |
| 12/31/77 | \$ 66.28 | |
| 12/31/78 | 241.65 | |
| 12/31/79 | 261.35 | |
| 12/31/80 | <u>282.80</u> | \$ 852.08 ✓ |
| <u>Sale of stock:</u> | | |
| 1,300 shares, Washington Mutual Investors Fund - | | |
| Proceeds | \$8,867.06 | |
| Inventory value | <u>7,310.31</u> | 1,556.75 ✓ |
| <u>CHANGES IN CORPUS:</u> | | |
| 6/ 1/77 Washington Mutual Investors Fund - 31 shares from reinvestment of dividend | 211.73 | \$ 211.73 |
| 5/30/78 Washington Mutual Investors Fund - 16 shares from reinvestment of dividend | 105.76 | 105.76 |
| 5/18/79 Washington Mutual Investors Fund - 43 shares from reinvestment of dividend | 283.37 | 283.37 |
| 1/16/78 5% stock dividend, New Virginia Bankcorporation - 11 shares | - | - |
| 1/15/80 5% stock dividend, New Virginia Bancorporation - 12 shares | - | - |
| <u>DISBURSEMENTS:</u> | | |
| 6/29/79 Bank service charge | | 1.00 |
| 9/28/79 Bank service charge | | 3.00 |
| 12/31/79 Bank service charge | | 3.00 |
| <u>EXPENSES PAID BY WIFE:</u> | | |
| 1976 real estate tax | \$1,360.35 | |
| 1977 real estate tax | 1,360.42 | |
| 1978 real estate tax | 1,282.23 | |
| 1979 real estate tax | 1,204.05 | |
| 1980 real estate tax | 1,475.74 | |
| Inventory and first account | <u>159.00</u> | 6,841.79 ✓ |
| <u>AMOUNTS PAID TO WIFE:</u> | | |
| Washington Mutual Investors Fund dividends | \$ 925.38 | |
| New Virginia Bankcorporation dividends | 325.28 | |
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| <u>ASSETS REMAINING AT DECEMBER 31, 1980:</u> | | |
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| 254 shares, New Virginia Bancorporation | | 1,952.50 |
| Washington-Lee Savings & Loan Association - Certificate | | 3,852.08 |
| Due to Jean M. O'Connell for net advances | | (3,050.27) |
| | <u>TOTAL</u> | <u>\$99,726.25 ✓ \$99,726.25 ✓</u> |

Respectfully submitted,

Jean M. O'Connell
Jean M. O'Connell, Executrix
(WIFE OF DECEDENT)
Rmct

April 10, 1981
Date

State of Virginia
County of Fairfax, to-wit:
I, Robert J. McCandlish, Jr., Commissioner of Accounts for Fairfax County, Virginia, do hereby certify that I have this day stated the foregoing account, after having given the notice required by law, and have approved the same. Vouchers for said disbursements were submitted therewith.
Given under my hand this 11th day of June
19 81.

Robert J. McCandlish, Jr.
Commissioner of Accounts
as aforesaid

I, JAMES E. HOOTNAGLE, Clerk of the Circuit Court of Fairfax County, Virginia, do hereby certify that the foregoing Account of JEAN M. O'CONNELL, Executrix of the Estate of HAROLD M. O'CONNELL, has been filed in accordance with the provisions of the Code of Virginia, and that the same has been placed to the credit of the said JEAN M. O'CONNELL.
Witness my hand and the Seal of the Court at Fairfax, Virginia, this 26th day of June, 1981.
James E. Hootnagle, Clerk
By: *James E. Hootnagle*
Deputy Clerk

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Jean M. O'Connell
6541 Franconia Road
Springfield, VA 22150

September 8 1983

FOR PROFESSIONAL SERVICES RENDERED

CHARGES AS OF SEPTEMBER 1

| | | | |
|-----|------------|-----|-----------------|
| 8/1 | Conference | 1.1 | <u>\$110.00</u> |
| | TOTAL DUE | | \$110.00 |


JEAN M. O'CONNELL
230-50-6044

6541 FRANCONIA ROAD, PH. 703 971-2855
SPRINGFIELD, VA 22150

Oct. 15 1983 359
68-101/560

Pay to the order of Philip D. Shalloway \$ 110⁰⁰/₁₀₀

One hundred ten and no/100 Dollars

 **VIRGINIA NATIONAL BANK**
Springfield, Virginia

Memo 83135 well Jean M. O'Connell

⑆05600101⑆ 359 453 6278 5⑈ ⑆0000011000⑆

JEAN M. O'CONNELL
230-50-6044

6541 FRANCONIA ROAD, PH. 703 971-2855
SPRINGFIELD, VA 22150

OCT 24 1983

FOR DEPOSIT ONLY
PHILIP D. SHALLOWAY
688-62966

PAY ANY BANK, P.E.G.
DOMINION
NATIONAL BANK
SPRINGFIELD, VIRGINIA
68-0560-760

DOMINION NATIONAL BANK
Pan Am
OCT 24 1983
29-3

OCT 24 1983

V I R G I N I A :

COMMISSIONER OF ACCOUNTS
CIRCUIT COURT OF FAIRFAX COUNTY

RE: Harold A. O'Connell Estate
FIDUCIARY NO: 21840

QUALIFICATION DATE: June 18, 1975

SUMMONS

TO THE SHERIFF OF Fairfax Co.
STATE OF VIRGINIA, GREETINGS:

WHEREAS,

Jean M. O'Connell
6541 Franconia Road
Springfield, VA

qualified on the above date as fiduciary of the above-referenced matter and has failed to make certain filings with the Commissioner of Accounts as required by law as more particularly set forth below;

THEREFORE, you are hereby directed to summons said fiduciary to present before me, within thirty (30) days from the date of the service of this summons, the following:

A proper Accounting accompanied by the required fee and vouchers.

GIVEN under my hand in Fairfax County, Virginia, this
15th day of November, 1977.

Jean M. O'Connell
(Deputy) Commissioner of Accounts

NOTICE TO THE FIDUCIARY:

The fee for this summons is \$25. Checks should be made payable to "Commissioner of Accounts". This fee is chargeable to the Fiduciary and not the Estate.



ROBERT J. McCANDLISH, JR.
COMMISSIONER OF ACCOUNTS

COMMISSIONER'S OFFICE

CIRCUIT COURT OF FAIRFAX COUNTY

4069 CHAIN BRIDGE ROAD

TELEPHONE 385-0268

FAIRFAX, VIRGINIA 22030



JESSE B. WILSON, III
DEPUTY COMMISSIONER OF ACCOUNTS

Date: December 26, 1984

Re: Estate of Harold A. O'Connell

Fiduciary No. 21840

Col. Clement J. Wall

3219 Highland Lane

Fairfax, VA 22031

You requested an extension to January 31, 1985 for filing
this accounting in the above matter.

This extension is hereby granted.

Very truly yours,

ROBERT J. McCANDLISH, JR.
Commissioner of Accounts

O'Connell; Harold A.

SUMMONS

21840

Acct. due

Sent to Sheriff: 11-15-84

Summons served: 11-16-84

due action: 12-16-84

ext 1-31-85

Will and estate papers of H. A. O'Connell
to Mr. Shalloway:

Please do what is necessary to really
finish up the estate details of my husband,
H. A. O'Connell. Will, estate filings, tax
forms and IRS letter of estate tax acceptance
are included. Thank you - Jean O'Connell,
12-18-84

JEAN M. O'CONNELL
6541 FRANCONIA ROAD
SPRINGFIELD, VA. 22150

*P.S. Notice from Sheriff 12/10/84 and \$2500 service check included.

97-2855
19 Dec 84 - file received from client - PDS
20 Dec 84 - file given to CJW -
Extension to 3 Jan 1985 granted by Comm. of Acts

Will WB 201-96
List of Heirs WB 201-110
Inventory WB 240-804

Real Estate (both parcels)
title held as tenants in common
1/2 undivided interest in

First Accounting filed & approved (21 May 75 to 26 May 1977) WB 241-397
Final Accounting (to be filed with Commissioner on 3 Jan 1985) (26 May 77 to 31 Dec 1980)
already filed 1980 - Jm. O'Connell delivered them

94-3700

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BEI-1

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BEI-2

12-18-84

Handwritten notes in a box, partially illegible.

JEAN M. O'CONNELL
6541 FRANCONIA ROAD
SPRINGFIELD, VA. 22150

BEI-3

*P.S. Notice from Sheriff 12/10/84 and \$25.00 service check included.
BEI-4

971-2855
BEI-5

19 Dec 84 - file received from client - PDS
20 Dec 84 - file given to CJW - BEI-6
Extension to 3 Jan 1985 granted by Comm. of Acts

BEI-7
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BEI-8
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BEI-9
BEI-10

BEI-11 941-3700

Second Account

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ESTATE OF HAROLD M. O'CONNELL

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1/3/85
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Respectfully submitted,

Jean M. O'Connell

Jean M. O'Connell, Executrix

Jan. 3, 1985

Date

Last Will and Testament

OF

JEAN M. O'CONNELL

I, Jean M. O'Connell, of the County of Fairfax, Virginia, being of sound and disposing mind, memory and understanding, do hereby make, publish and declare this instrument in writing as and for my Last Will and Testament, hereby expressly revoking all former Wills and other testamentary dispositions heretofore made by me.

1. I direct that all my just debts and funeral expenses be paid as promptly as practicable after my death. I authorized my co-executors, hereinafter named, to expend such sums as they in their sold discretion may deem proper for my funeral and interment, including the acquisition of any burial site and the erection and engraving of grave monuments, regardless of any limitation fixed by statute, rule of court, or otherwise.

2. All the rest, residue and remainder of my property, real and personal, tangible and intangible, wheresoever situate and howsoever held, I give, devise and bequeath, in fee simple, share and share alike, to my children, JEAN MARY O'CONNELL NADER, of New Kensington, Pennsylvania; SHEILA ANN O'CONNELL-SHEVENELL, of Portland, Maine; and ANTHONY MINER O'CONNELL, of St. Louis, Missouri, per stirpes.

3. I hereby nominate, constitute and appoint my said son, ANTHONY MINER O'CONNELL, and my lawyer, PHILIP D. SHALLOWAY, to be the Co-Executors of this, my Last Will and Testament, to serve without bond or undertaking; and I hereby waive appraisement of my estate. I authorize and empower my Co-Executors in the administration of my estate to sell, transfer, assign and convey, upon such terms as they shall deem proper, any part or all of my real and personal estate, at public or private sale, without order of court, and to execute, acknowledge and deliver proper deeds therefor, without liability on any purchaser to see to the application of the purchase money.

This has been followed by later will.
Jean O'Connell

CPW
MMS

IN WITNESS WHEREOF, I have hereunto set my hand and seal to this my Last Will and Testament, on the margin of each page of which other than this page being any signature and seal, I have signed my name, all on this 3rd day of Jan., 1985, in the County of Fairfax, Commonwealth of Virginia.

Jean M. O'Connell
JEAN M. O'CONNELL

The foregoing signature of the Testatrix was made, and the foregoing Will was acknowledged by the said Testatrix, in the presence of us, three competent witnesses, present at the same time; and we, the said witnesses do hereunto subscribe said Will in the presence of said Testatrix, and in the presence of each other, at the request of said Testatrix, this 3rd day of January, 1985.

Kellie A. Johnson
Philip D. Shalloway
Clement J. Wall

9431 Arlington Blvd Apt 204
Fairfax, Va 22031
3090 Greenway Court
Fairfax, Va 22031
3219 Highland Lane
Fairfax, Virginia 22031

STATE OF VIRGINIA
COUNTY OF FAIRFAX, to-wit:

BEFORE ME, the undersigned Notary Public, on this day personally appeared JEAN M. O'CONNELL, Kellie A. Johnson, Philip D. Shalloway, and Clement J. Wall, known to me to be the Testatrix and the witnesses, respectively, whose names are signed to the foregoing Last Will and Testament, and all of these persons being by me first duly sworn, JEAN M. O'CONNELL, the Testatrix, declared to me and to the witnesses in my presence that said instrument is her Last Will and Testament and that she had willingly signed and executed it in the presence of said witnesses as her free and voluntary act for the purposes therein expressed. Said witnesses stated before me that the foregoing Last Will and

Testament was executed and acknowledged by the Testatrix as her Last Will and Testament in the presence of said witnesses who, in her presence and at her request, and in the presence of each other, did subscribe their names thereto as attesting witnesses on the day of the date of said Will, and that the Testatrix, at the time of the execution of said Will, was over the age of eighteen (18) years and of sound and disposing mind and memory.

Jean M. O'Connell
JEAN M. O'CONNELL

Kellie A. Johnson
Witness

Philip D. Shalloway
Witness

Clement J. Wall
Witness

Subscribed, sworn and acknowledged before me by JEAN M. O'CONNELL, the Testatrix, and Louie A. Johnson, Philip D. Shalloway, and Clement J. Wall, witnesses, this 3rd day of January, 1985.

[Signature]
NOTARY PUBLIC

My Commission Expires: 11/3/86

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

January 3 19 85

FOR PROFESSIONAL SERVICES RENDERED

| | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|
| Review of file, Meeting with Commissioner of Accounts, Review of Fiduciary File, Checking of land records to ascertain title, Telephone calls to accountant, and Conference | 6.0 hrs. | \$600.00 |
| Preparation of Last Will and Testament | | <u>150.00</u> |
| BALANCE DUE ON ACCOUNT | | \$750.00 |

Shalloway 941-3700
That I called Com. of Accts
re Dec. 15th not Nov. 15

That I will see the acct.
tomorrow at 8:30 and the
acct. will be filed before
Jan. 31st.

I rec'd a bill that must
have been a mistake. Mr.
Wall got the extension but
I can't see that he has done
600 worth of lawyering. I
asked the Com. of Accts office
if that was the cost.

155.00 } After I make
file the acting
I would like to consider
petitioning to have the
clause removed from the
will. But what is cost.

will pd for in Oct 24 83
checks cancelled.

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW

SUITE 505

7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
703/941-3700

January 16, 1985

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

Dear Mrs. O'Connell:

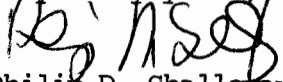
Upon reviewing my files I cannot find where you have paid for your Last Will and Testament. You stated that you had a cancelled check. Please forward to me a copy of that check so I can determine where that payment was credited. Usually on fee checks, we like to pencil in our file number somewhere on the face of the check and that reference would be most helpful to me in determining where your check was credited.

I discussed your objections concerning our fees with Mr. Wall who was quite surprised at your position. Since you feel so strongly that the work we did at your request did not justify the \$600.00 charged, Mr. Wall authorized me to deduct \$100.00 from the bill for the time he expended. You must remember the work we did for you was done without consultation since you delivered a file to us and was unavailable for discussion about it since you went out of town immediately after delivery. The file was reviewed carefully. Mr. Wall did contact and meet with the Commissioner of Accounts and reviewed your probate file at the clerk's office. We also made various telephone calls to your past accountants and checked the land records to make sure that title was correct. All of these things involve time which the Client does not see but the time, in fact, was expended.

In reference to outlining your fee to eliminate the Trust set up in your husband's Last Will and Testament, I feel that since you have disputed our time and fees previously charged to you, it would be better for you to obtain another attorney to provide that service for you. If you will recall, your husband's Will was quite long and complicated and removal of the Trust could be quite complex and time consuming, and it would be unfair for me to estimate a fee to provide that service at this time.

Remember your deadline to file your accounting is the 31st day of this month, and I wish you the best of luck in accomplishing this accounting and finding another attorney to provide the services outlined herein.

Very truly yours,


Philip D. Shalloway

over

PDS/mb

Supplant

"I also would like you to be at least courteous to my friends. They know you do not want them around so you may not see much of them. They are people who helped me when I was desperately in need of help and had no place to turn. Joanne especially was helpful. When [1] **Ed Prichard** was going to charge me ¼ of your Dad's estate for his fee and [2] **Shalloway** had a mental break down when he was going to work on the estate it was Joanne who helped me by explaining what I had to do. She did not want to be a co-trustee but I begged her and she agreed reluctantly tho she had never done it for anyone else. I still think [3] **you** owe her an apology and a box of candy or bouquet of flowers.* Better late than never. And I would feel ever so much better. Please. Just treat my friends like you want me to treat yours. ..."

(From Jean O'Connell's letter of September 6, 1988, to Anthony O'Connell, in part)

*I would like to know what Joanne Barnes told Jean O'Connell in her telephone call (Reference Joanne Barnes letter of August 16, 1985)

Flag:

If you are led to believe that your established advisers are not serving you well or you should not pay them their full fees; and you trust that and do not pay them their full fee, it guarantees that your relationship with your established advisers will end.

Edward White only charged Jean O'Connell \$50 for her new Will on May 30, 1985, naming Joanne Barnes and Anthony O'Connell as co-executors. Jean O'Connell's check registry shows no charge for the September 20, 1985, codicil to her Will by Edward White naming Edward White and innocent Jean Nader as co-executors.

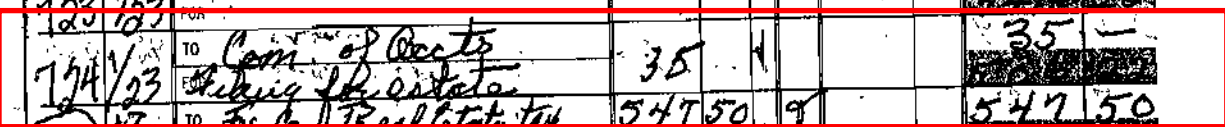
| ITEM NO OR TRANSACTION YEAR | DATE | DESCRIPTION OF TRANSACTION | AMOUNT OF PAYMENT OR WITHDRAWAL (*) | OTHER DEDUCT | AMOUNT OF DEPOSIT OR INTEREST (*) | ADDITIONS | BALANCE FORWARD |
|-----------------------------|-------|----------------------------------|-------------------------------------|--------------|-----------------------------------|-----------|-----------------|
| | | | | | | | 875 95 |
| 707 | 12/24 | TO Howard | 20 | ✓ | | | 875 95 |
| 709 | 12/24 | TO John (4665) | 20 | | | | 850 95 |
| 709 | 12/26 | TO Cash (N.C. Hader for 100) | 100 | ✓ | | | 750 95 |
| 710 | 12/29 | TO Reekin 29.10 Central Fidelity | 179 41 | ✓ | | | 571 54 |
| | | TO Marshall 105.8 Spiegel 445 | 525 50 | ✓ | | | 45 04 |
| 679 | 1/30 | TO Central Fidelity | | | | | 45 04 |
| 711 | 1/31 | TO Annuity -350 | 150 | ✓ | 1466 28 | | 1466 28 |
| | | FOR Cash | | | | | 1321 32 |

| ITEM NO OR TRANSACTION YEAR | DATE | DESCRIPTION OF TRANSACTION | AMOUNT OF PAYMENT OR WITHDRAWAL (*) | OTHER DEDUCT | AMOUNT OF DEPOSIT OR INTEREST (*) | ADDITIONS | BALANCE FORWARD |
|-----------------------------|---------|---------------------------------|-------------------------------------|--------------|-----------------------------------|-----------|-----------------|
| 712 | 1/2/80 | TO Vapco | 102 44 | ✓ | | | 102 44 |
| 713 | 1/2/80 | TO A.P. Woodson Co. | 117 06 | ✓ | | | 234 88 |
| 714 | 1/2/80 | TO Wash Post | 17 20 | ✓ | | | 117 06 |
| 714 | 1/2/80 | FOR 12/24 - 12/27 | | | | | 100 62 |
| 714 | 1/2/80 | TO Insurance annuity | | | 63 10 | | 63 10 |
| 715 | 1/2/80 | TO Com of Accts Void | 35 | | | | |
| 716 | 1/2/80 | TO Council of Wives of the Navy | 136 | | | | |
| | | FOR Judge S.N.A. Symposium | | | | | |
| | 1/10/80 | TO Roth Carpet | | ✓ | 1000 | | 1000 |
| | | FOR | | | | | |

| ITEM NO OR TRANSACTION YEAR | DATE | DESCRIPTION OF TRANSACTION | AMOUNT OF PAYMENT OR WITHDRAWAL (*) | OTHER DEDUCT | AMOUNT OF DEPOSIT OR INTEREST (*) | ADDITIONS | BALANCE FORWARD |
|-----------------------------|---------|-----------------------------------------|-------------------------------------|--------------|-----------------------------------|-----------|-----------------|
| 717 | 1/10/85 | TO Am. Canadian Line Virgin Islands 3/1 | 1392 00 | ✓ | | | 1392 00 |
| 718 | 1/14/85 | TO N.C. Hader Jr | 20 | ✓ | | | 1372 00 |
| | | FOR B-day | | | | | 1352 00 |
| 719 | | TO Interest Gen Sav | 49 | ✓ | | | 1303 00 |
| | | FOR rings repaired | | | | | 1254 00 |
| 720 | 1/21 | TO Pioneer Mobile | 20 | ✓ | | | 1234 00 |
| | | FOR change flat tire | | | | | 1214 00 |
| 722 | | TO Duo - Landscape Des | 5 00 | ✓ | | | 1209 00 |
| | | FOR | | | | | 1209 00 |

| ITEM NO OR TRANSACTION YEAR | DATE | DESCRIPTION OF TRANSACTION | AMOUNT OF PAYMENT OR WITHDRAWAL (*) | OTHER DEDUCT | AMOUNT OF DEPOSIT OR INTEREST (*) | ADDITIONS | BALANCE FORWARD |
|-----------------------------|------|------------------------------|-------------------------------------|--------------|-----------------------------------|-----------|-----------------|
| 723 | 1/22 | TO Safe Deposit Box Chg | 40 00 | | | | 1169 00 |
| 723 | 1/23 | TO Bk of Va dividend | | | 49 50 | | 1218 50 |
| 723 | 1/23 | TO Cash | 100 | ✓ | | | 1118 50 |
| 724 | 1/23 | TO Com of Accts | 35 | ✓ | | | 1083 50 |
| | | FOR 1/23 - 1/24 | | | | | 1048 50 |
| 725 | 1/26 | TO Central Fidelity | 101 38 | ✓ | | | 947 12 |
| | | FOR Bonambuli 35 per 1/16/38 | | | 1000 | | 947 12 |

9.85



Jan. 23, 1985

Copy of check made and sent.

Note added:

"As you suggested, the day I was in your office I went immediately to the Commissioner of Accounts office. The estate filing for Dec. 31, 1980 with fee paid was in my file there. I do not understand how it could be reported missing by your office."

This copy for my file.

Jean O'Connell

Copy of note sent to Mr. Shalloway 2/3/85

To: Mr. Philip Shalloway
7620 Little River Turnpike
Annandale, Va. 22150

February 3, 1985

From: Jean O'Connell
6541 Franconia Road
Springfield, Va. 22150

I would appreciate it if
you would send me the remaining
papers you have of mine including
the IRS notice of estate tax accept-
ance and the notice from the
Fx. Sheriff's office delivered
to me Dec. 15, 1984.



Thank you

Jean O'Connell

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
703/941-3700

February 8, 1985

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

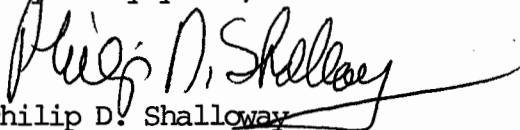
Dear Mrs. O'Connell:

I am in receipt of your letter of February 3, 1985, and even though I did not remember keeping any of your papers I completely reviewed my file, contacted Mr. Clement J. Wall who also reviewed his file, and it is both of our recollection that all the papers, including the items you requested in your correspondence, were returned to you at our last meeting on January 3, 1985.

The two items you refer to had to be given to you because, without them, your accountant could not have prepared the final accounting that was due January 31, 1985. Perhaps you should contact your accountant to see if you gave them to her.

I hope you find your papers soon.

Very truly yours,


Philip D. Shalloway

PDS/mb

cc: Clement J. Wall

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

February 1419 85

FOR PROFESSIONAL SERVICES RENDERED

| | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|
| Review of file, Meeting with Commissioner of Accounts, Review of Fiduciary File, Checking of land records to ascertain title, Telephone calls to accountant, and Conference | 6.0 hrs. | \$600.00 |
| Preparation of Last Will and Testament | | <u>150.00</u> |
| BALANCE DUE ON ACCOUNT | | \$750.00 |
| Credit from Clement J. Wall | | 100.00 |
| Credit on previous payment (*) | | <u>110.00</u> |
| BALANCE DUE ON ACCOUNT | | \$540.00 |

(*) I believe this \$110.00 was paid for a conference and not for your Will since it was not executed until sometime later. However, to prevent any further confusion I am giving you full credit for this payment.

Jean O'Connell

February 25, 1985

Dear Mr. Shelbourn,

I admired the way you critiqued the contract of a friend of mine and how well you handled the problem of another friend I had recommended go to you. In fact there was no doubt in my mind that I could trust you implicitly to help me file an estate accounting.

I am sorry that the issue has become so confused. The enclosed check \$80 - I feel more than covers the time spent on what actually was useful to my estate accounting. That is calling the Com. of Accounts office for a time extension - 30 days - the same time the Sheriff's office was late in delivering the notice to me.

Jean O'Connell



PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW

SUITE 505

7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
703/941-3700

March 1, 1985

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

Dear Mrs. O'Connell:

Enclosed is your check in the amount of \$80.00 which is completely unacceptable.

As I explained in my previous letter, the time was spent on your case and you have also received a credit of \$210.00 towards the amount billed and no other credits will be given.

The total sum of \$540.00 is still due and owing.

Very truly yours,

Philip D. Shalloway
Philip D. Shalloway

PDS/mb
Encl.

JEAN M. O'CONNELL
6541 FRANCONIA ROAD, PH. 703-971-2855
SPRINGFIELD, VA 22150

Feb. 25 19 85 751

68-101v
560

Pay to the order of Philip D. Shalloway \$ 80⁰⁰/₁₀₀

Eighty and 00/100 Dollars

SOVRAN BANK
Sovran Bank, N.A., Springfield, Virginia

Memo Jean M. O'Connell

RED PEPPER
Capsicum longum

AMERICAN PC

⑆056001011⑆ 751 453 6278 5⑈

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of March 3119 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 841-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of April 30 19 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING \$540.00

1985

| PLEASE BE SURE TO DEDUCT CHARGES THAT AFFECT YOUR ACCOUNT | | | | SUBTRACTIONS | | ADDITIONS | | BALANCE FORWARD | |
|-----------------------------------------------------------|------|-----------------------------|-------------------------------------|--------------|--------------|-----------------------------------|----|-----------------|----|
| ITEM NO OR TRANSACTION CODE | DATE | DESCRIPTION OF TRANSACTION | AMOUNT OF PAYMENT OR WITHDRAWAL (-) | ✓ | OTHER DEDUCT | AMOUNT OF DEPOSIT OR INTEREST (+) | | | |
| | | TO correction - 5-3 deposit | 92 | | | 92 | 98 | 150 | 4 |
| | | FOR | | | | | | 92 | 98 |
| 807 | 5/30 | TO White, Edward Lawyer | 50 | - | ✓ | | | 50 | - |
| | | FOR new will. | | | | | | 50 | - |
| 808 | 5/30 | TO Wash. Post. 4/14-6/9 | 17 | 20 | ✓ | | | 17 | 20 |
| | | FOR | | | | | | 17 | 20 |
| | 6/1 | TO Annuity | | | ✓ | 1526 | 65 | 1526 | 65 |
| | | FOR | | | | | | 1526 | 65 |
| 809 | 5/9 | TO Cash | 100 | | ✓ | | | 100 | - |
| | | FOR | | | | | | 100 | - |
| 810 | 4/3 | TO Leukemia NCA FCC | 3 | - | ✓ | | | 3 | - |
| | | FOR | | | | | | 3 | - |
| 811 | 6/3 | TO Cash | 100 | - | ✓ | | | 100 | - |
| | | FOR | | | | | | 100 | - |
| 812 | 6/3 | TO Hurdberg | 308 | 00 | ✓ | | | 308 | 50 |
| | | FOR | | | | | | 308 | 50 |
| 813 | 6/3 | TO Assoc for Am. Hort | 20 | - | ✓ | | | 20 | - |
| | | FOR (due Jan 1 '85) | | | | | | 20 | - |
| 814 | 6/3 | TO Va. Brewer | 58 | 24 | ✓ | | | 58 | 24 |
| | | FOR | | | | | | 58 | 24 |
| 815 | 6/3 | TO Public Citizen | 10 | - | ✓ | | | 10 | - |
| | | FOR (Madax - Wash DC) | | | | | | 10 | - |
| 816 | 6/8 | TO Receipt | 45 | - | ✓ | | | 45 | - |
| | | FOR | | | | | | 45 | - |

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of June 301985

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of July 31 19 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of August 31 19 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of September 30 19 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

PHILIP D. SHALLOWAY
ATTORNEY AND COUNSELLOR AT LAW
SUITE 505
7620 LITTLE RIVER TURNPIKE
ANNANDALE, VIRGINIA 22003

POST OFFICE DRAWER 450

TELEPHONE
(703) 941-3700

Mrs. Jean M. O'Connell
6541 Franconia Road
Springfield, VA. 22150

As of October 31 19 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

\$540.00

V I R G I N I A :

COMMISSIONER OF ACCOUNTS
CIRCUIT COURT OF FAIRFAX COUNTY

RE: Harold A. O'Connell Estate
FIDUCIARY NO: 21840

QUALIFICATION DATE: June 18, 1975

SUMMONS

TO THE SHERIFF OF _____ COUNTY OF FAIRFAX
STATE OF VIRGINIA, GREETINGS:

WHEREAS,

Jean M. O'Connell
6541 Franconia Road
Springfield, VA 22152

qualified on the above date as fiduciary of the above-referenced matter and has failed to make certain filings with the Commissioner of Accounts as required by law as more particularly set forth below;

THEREFORE, you are hereby directed to summons said fiduciary to present before me, within thirty (30) days from the date of the service of this summons, the following:

A proper Accounting accompanied by the required fee and vouchers.

GIVEN under my hand in Fairfax County, Virginia, this

23rd day of July, 1986.



(Deputy) Commissioner of Accounts

NOTICE TO THE FIDUCIARY:

The fee for this summons is \$25. Checks should be made payable to "Commissioner of Accounts". This fee is chargeable to the Fiduciary and not the Estate.

pd 8-6-86

Executed in Fairfax County, Virginia, this
24 day of July, 1912, 1022 A.M.,
by POSTING a true copy of the within mentioned
papers on the front door of the usual place of abode of
Leav M. O'Connell
neither...S. he nor any member of the family over
sixteen years of age being found there.

M. WAYNE HUGGINS, SHERIFF

By W. Milton 241 Deputy Sheriff

Dear Tony,

Sept. 6 1988

It was a treat to have your letter and especially nice typed. I never know for sure if I have read your writing correctly.

Thanks for the copy of the Accotink tax bill. I had called them (the assessment office) to find out why I hadn't received it. They told me "the name had been changed to Anthony M. O'Connell" but did not explain or say if you had paid it. I am relieved to know you did pay it. ~~As~~ I understand correctly that you will be paying the other half in Dec.? Anyway will you let me know when you pay it in the future as I do like to be sure its paid. The rate sure has gone up! I am sure there will be an accounting of what the trust owes as you suggested. Before tax time I have to have much information about what money has been put in the house since we bought it in 1937. I did the same when the county took land for the school.

We do seem to have a lot of misunderstandings. When I said I did not want to see the place again I was not referring to how you had landscaped it because I haven't seen what you have done. I would like to have seen that but couldn't get there and that you had asked me not to trespass. It was the drought damage I was referring to - the dead umbrella pine (value 1000 ±)

the magnolia trees damage. I do hope you can get there in time to water the boxwood and that you will sell it or use it ~~something~~ as it is worth quite a lot. You could check a good nursery like Hills just off Glebe Rd. to get an idea of the price and then advertise it for sale in papers - Journal or Post etc.

The "no trespassing" sign has been torn off your barricade. There are 2 tiny wisps of cloth left. I could not see from the road whether the place had been ransacked or not.

If you want some one to check it, fix sign, water boxwood etc. you could call Warren Hosa flock 971-2529 - near where Dodson's live. He can also mow with The Snapper. Did it once for me. He is a retired post man. He may have sold & moved by now. &

J. M. Sheila and Andy were here the weekend before Labor Day. We ate lobster and crab cakes and shopped & shopped and traded clothes. It was a wonderful time.

I guess you must be having a difficult time selling your house and hope you have good luck soon. It must be very frustrating being all packed up and waiting. Have any nibbles.

I am enjoying myself more all the time. In fact have been so busy have missed many meals! It is really a delightful way to live. Have signed up for a trip to Richmond Art Museum

and a trip to Ken Center for "Tosca". Shopping with the girls finally bought a desk. Wish I had one years ago. It is a delight to have places to put things.

Received the rug. Thanks so much for sending it. Didn't expect it until you came.

Sorry you that I resented your coming here. Quite the contrary. I think you should be here to take advantage of the prosperity and to enjoy your old friends and all the things there are that you are interested in.

You said you would like to air our misunderstandings which I think is a wonderful idea. I think it all stems from lack of information mostly. I would feel so much better if you could keep me advised of what you are doing with the trust and some of your personal plans - such as what you will be doing when you begin living here. Real estate - conservatorship or browsing for a different career. It would be so much easier if I knew what you were currently interested in. I try to keep everyone up on my main interests but think sometimes it is a waste of energy.

I also would like you to be at least courteous to my friends. They know you do not want them around so you may not see much of them. They are people who helped me when I was desperately in need of help and had no place to turn. Joanne especially was helpful. When Ed Britchard was going to

charge me over 1/4 of your Dad's estate for his fee and Shalloway had a mental break down when he was going to work on the estate it was Joanne who helped me by explaining what I had to do. She did not want to be a co-trustee but I begged her and she agreed reluctantly tho she had never done it for anyone else. I still think you owe ~~her an apology~~ and a box of candy or bouquet of flowers. Better late than never. And I would feel ever so much better. Please. ~~Just treat my~~ friends like you want me to treat yours.

Maybe that is enough for now and you can have time to let me know how you feel.

I do love you - you know

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