

Philip Shalloway

1983

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
DOMINION NATIONAL BANK
688-62966

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

Pan Am
OCT 24 1983
29-3
DOMINION NATIONAL BANK

OCT 24 1983

1984

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 (26 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

941-3700

1985

**Will of Jean M. O'Connell
1985.01.03**

Co executor are Anthony Miner O'Connell and Philip D. Shalloway.
Prepared by Philip D. Shalloway.

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
101

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

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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

PHILIP D. SHALLOWAY
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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:

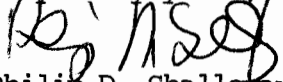
Upon reviewing my files I cannot find where you have paid for your Last Will and Testament. You stated that you had a cancelled check. Please forward to me a copy of that check so I can determine where that payment was credited. Usually on fee checks, we like to pencil in our file number somewhere on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

PHILIP D. SHALLOWAY
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TELEPHONE
703/941-3700

February 8, 1985

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

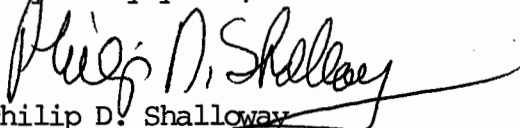
Dear Mrs. O'Connell:

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

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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.

PHILIP D. SHALLOWAY
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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

RED PEPPER
Capsicum longum

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

Memo Jean M. O'Connell

⑆ 05600 10 1 1 ⑆ 751 ⑆ 453 6278 5 ⑆

PHILIP D. SHALLOWAY
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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

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
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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
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TELEPHONE
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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