

Estate of
H. A.
O'Connell

1975

IN THE CIRCUIT COURT OF THE COUTNY OF FAIRFAX, VIRGINIA

To the Clerk of the Circuit Court of
Fairfax County, Fairfax, Virginia

The undersigned presents herewith, for probate a paper writing dated April 11, 1974,
which g he believes to be the Last Will and Testament of Harold A. O'Connell
and states that he knows of no other papers of a testamentary character now in existence which were executed
by said Testator and that said Testator died on the 26th day of May, 1975
and was at the time of his death a resident of Fairfax County, Virginia.

The undersigned, for the purpose of obtaining the probate of said paper writing, submits under oath the
following information in connection therewith:

1. Name of Executor appointed by will and her address:
Jean M. O'Connell, 6541 Franconia Rd., Springfield, Va, 22150
2. Residence of Executor: Same 971-2855
3. If no Executor is appointed in will, who is nominated as Administrator c.t.a.?
N/A
4. Name of person making the nomination and h authority for so doing: N/A
5. Value of decedent's real estate in Virginia: \$112,500.00
6. Value of decedent's personal property:

Tangible	<u>500.00</u>	
Intangible	<u>11,935.00</u>	<u>12,435.00</u>
Total value of real and personal estate		<u>\$124,935.00</u>
7. Amount of bond required (to be fixed by Clerk) \$
8. Name of surety tendered on bond: waived
9. Color of decedent: Caucasian Married or single: Married
10. Age at death: 79 years

Jean M O'Connell
Subscribed and sworn to before me in the Clerk's Office of the Circuit Court of Fairfax County, Virginia,

this 18th day of June, 1975
Jean M O'Connell
Deputy Clerk

273-4230
Munford R. Warten, Jr. Attorney

STATE OF VIRGINIA }
COUNTY OF FAIRFAX } To-wit:

I, W. Franklin Gooding, Clerk of the Circuit Court of Fairfax County, Virginia, the same being a Court of Probate and of Record and having a seal, do hereby certify that it appears of record in my office pursuant to law that JEAN M. O'CONNELL has been duly appointed as EXECUTOR under the Last Will and Testament of HAROLD A. O'CONNELL and that she has qualified as such by taking the oath prescribed by law, and by entering into and acknowledging a BOND in the penalty of ONE HUNDRED FIFTY THOUSAND Dollars, with waived and approved surety.

I further certify that the said appointment and qualification are still in full force and effect and have not been revoked.

IN TESTIMONY WHEREOF I have hereunto set my hand, and affixed the seal of said Court hereto, at Fairfax, Virginia, this 18th day of June, 1975.

W. FRANKLIN GOODING, CLERK

By: *Jane W. Howell*
Deputy Clerk.

1976

Virginia Individual Income Tax Return

Department of Taxation For calendar year 1974 or taxable year beginning 1974, and ending 19

PLEASE PRINT OR TYPE

First name and initial: Harold A. (Deed. 5/26/75) and Jean M. O'CONNELL
Last name: O'CONNELL
Your social security number: 577 58 9818
Present home address: 6541 Franconia Road
City: Springfield, Virginia
ZIP code: 22150
Your occupation: Retired Civil Service
Spouse's occupation: Housewife

FILING STATUS: Married, filing separately on this combined return
PERSONAL EXEMPTIONS: Yourself 1, 85 or over 1, Blind 1, Dependents 2
Number of Exemptions: 4
Amount to be entered on line 8 below: 600, 1,200

Table with 3 columns: Line Number, Description, Column A, Column B. Includes lines 5-14 for Federal adjusted gross income, deductions, and total tax.

15 CREDITS: Virginia income tax withheld, 1974 estimated Virginia income tax payments, Out-of-State tax credit. Total credits: 797.95
16 BALANCE DUE: 107.26
17 OVERPAYMENT: 107.26
18 Amount to be CREDITED on 1975 estimated tax: 0
19 Amount to be REFUNDED: 107.26

File this return by midnight May 1, 1975, with your local Commissioner of the Revenue or Director of Finance. ATTACH COMPLETE COPY of each Federal schedule C, D, E, or F filed with your Federal return and all other schedules supporting gross receipts and depreciation.

I (we) the undersigned, declare under penalty of law that I (we) have examined this return and to the best of my (our) knowledge and belief it is a true, correct, and complete return. We agree that filing separately on this combined return makes us jointly and severally liable for the amount of tax shown to be due on this return and any refunds due will be made payable to us jointly.
Sign here: Victor R. Monte, 1/12/76
Signature of preparer: STANSON, HEMPER AND BRUNER, 100 N. Pitt St., Alex., Va. 22314

COMMONWEALTH OF VIRGINIA
DEPARTMENT OF TAXATION
Richmond 23282

21840

Jan. 26, 1976

CERTIFICATE SHOWING INHERITANCE TAX PAID

270

This is to certify that Inheritance Tax, amounting to \$ 1,251.12, determined by the Department of Taxation according to law, on the estate of Harold A. O'Connell of Fairfax County, Virginia, who died May 26, 1975 has been paid into the State Treasury.

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

DEPARTMENT OF TAXATION

Lawrence C. Haake, Jr.

Director, Division of Inheritance and Gift Taxes

(See Law On Reverse Side)

1977



ROBERT J. MCCANDLISH, JR.
COMMISSIONER OF ACCOUNTS

COMMISSIONER'S OFFICE

CIRCUIT COURT OF FAIRFAX COUNTY

4069 CHAIN BRIDGE ROAD

TELEPHONE 273-2440

FAIRFAX, VIRGINIA 22030

November 7, 1977



STEPHEN L. BEST
DEPUTY COMMISSIONER OF ACCOUNTS

Jean M. O'Connell
6541 Franconia Road
Springfield, VA 22151

RE: Estate of Harold A. O'Connell

Dear Mrs. O'Connell:

You qualified as administrator of the above estate on June 18, 1975. By law you are required to file, in this office, an inventory of the assets within four months of the date of qualification. You are also required to file an accounting of the administration of the estate within sixteen months of the date of qualification.

Our records indicate that neither of the above has been filed. Please submit the inventory and account, together with all vouchers in support thereof, at your earliest convenience to avoid further action on the part of this office.

Sincerely yours,

Stephen L. Best

Stephen L. Best
Deputy Commissioner of Accounts

Ans. Nov. 18, 1977 & asked for extension to Feb. 1, 1978

Called Nov. 30 - 77 - Should have received pkt. of papers at time of qualifying as administrator.

Feb. 1, 1978. Mission accomplished !!!

1978

Inventory

VIRGINIA: IN THE CLERK'S OFFICE OF THE CIRCUIT COURT OF THE COUNTY
 OF FAIRFAX, ON THE 26th DAY OF May, 1975

INVENTORY OF THE ESTATE OF

Harold A. O'Connell

21840

I. Property under the authority, supervision and control of the fiduciary

DESCRIPTION OF PROPERTY	VALUE	
1/2 interest in residence and 3.3365 a. at 6541 Franconia Road,		
Springfield, Virginia	40,681	00
1/2 interest in 15 acres of unimproved land, Accotink Station,		
Fairfax County, Virginia	37,500	00
605 shares Washington Mutual Investors Fund, Inc.	6,709	45
220 shares New Virginia Bancorporation	1,952	50
Checking account, Northern Virginia Bank	3,245	18
Personal books, clothing, etc.	500	00
Refund - Remington shaver	5	00
Overpayment of Virginia tax	57	14
TOTAL	\$ 90,650	27 ✓

(Use additional sheets if necessary)

II. Other property of the estate of which the fiduciary has knowledge. (If none, so state)

DESCRIPTION OF PROPERTY	VALUE	
Washington-Lee Savings and Loan Association -		
Certificate 115-40680-0, POD to Jean M. O'Connell	13,453	52
Washington-Lee Savings and Loan Association -		
Savings 15-5425-7	2,070	08
Accrued interest	16	38
Northern Virginia Bank - Certificate 10001360-6 POD to		
Jean M. O'Connell	1,000	00
TOTAL	\$ 16,539	98

(Use additional sheets if necessary)

CERTIFICATE OF FIDUCIARY

I, Jean M. O'Connell, solemnly swear (or affirm) that to the best of my knowledge and belief the foregoing inventory embraces all the property, both real and personal, of the estate of Harold M. O'Connell under my authority, supervision and control as Executrix thereof, aggregating \$ 90,650.27; and also all other property of said estate of which I have knowledge.

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

Subscribed and sworn to before me this 1st day of February, 1978
My commission expires Sept. 16, 1979

Jane R. Bailey
Notary Public

COMMISSIONER'S CERTIFICATE

Inspected, found to be in proper form, and approved this 21st day of Feb, 1978
Thos J. M. [Signature]
Commissioner of Accounts

VIRGINIA:

In the Clerk's Office of the Circuit Court of the County of Fairfax on the _____ day of _____, 19_____

The foregoing Inventory of the estate of _____, deceased, was this day received and admitted to record.

_____, Clerk.
By _____, D. C.

IN THE CLERK'S OFFICE OF THE COUNTY OF FAIRFAX, VIRGINIA
Mar 13 1978
D. C. [Signature]
Clerk

First Account

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF Harold M. O'Connell 21840 PAGE 1

First ACCOUNT OF Jean M. O'Connell
 Executrix

COVERING PERIOD FROM May 26, 1975 TO May 26, 1977

DESCRIPTION	Assets Received (or on hand)	Disbursements
<u>INVENTORY OF ESTATE AT MAY 26, 1975:</u>		
1/2 interest in residence and 3.3365 a. at 6541 Franconia Road, Springfield, Virginia	\$40,681.00	
1/2 interest in 15 acres of unimproved land, Accotink Station, Fairfax County, Va.	37,500.00	
605 sh. Washington Mutual Investors Fund, Inc.	6,709.45	
220 shares New Virginia Bancorporation	1,952.50	
Northern Virginia Bank, checking account	3,245.18	
Personal books, clothing, etc.	500.00	
Refund - Remington Shaver	5.00	
Overpayment of Virginia Tax	57.14	
	\$90,650.27	
<u>RECEIPTS:</u>		
<u>Dividends:</u>		
Washington Mutual Investors Fund, Inc.		
8/22/75	\$ 72.60	
11/21/75	78.65	
2/20/76	72.60	
5/21/76	145.20	
5/21/76	217.80	
8/20/76	72.60	
11/18/76	84.70	
2/18/77	84.70	
		828.85
New Virginia Bancorporation:		
7/15/75	\$ 16.50	
10/15/75	16.50	
1/15/76	16.50	
4/15/76	18.70	
7/15/76	22.00	
10/15/76	22.00	
1/15/77	23.10	
4/15/77	23.10	
		158.40
<u>Other Receipts:</u>		
2/18/77 County of Fairfax - Sewer easement - Accotink Property		605.00
<u>CHANGES IN CORPUS:</u>		
9/13/76 605 shares Washington Mutual Investors Fund received in 2-1 stock split		-
10/15/76 - 11 shares New Virginia Bancorporation received as 5% stock dividend		-
<u>ADVANCES BY WIFE:</u>		
7/23/75	\$ 16.38	
7/23/75	2,420.70	
7/31/76	16.34	
		2,453.42
TOTAL		2,453.42

Vouchers in support of said disbursements are submitted herewith.

2-1-78
Date

Jean M. O'Connell
(Signature and Title)

(Signature and Title)

ESTATE OF Harold M. O'Connell PAGE 2

First ACCOUNT OF Jean M. O'Connell

Executrix _____

COVERING PERIOD FROM May 26, 1975 TO May 26, 1977

DESCRIPTION	Assets Received (or on hand)	Disbursements
DISBURSEMENTS:		
7/17/75 County of Fairfax - 1/2 real estate tax 1975		1,203.99 ✓
7/17/75 Boothe, Pritchard and Dudley - reimbursement for qualification costs		176.00 ✓
8/17/75 Jean O'Connell - reimbursement for cemetery lot and opening grave		408.75 ✓
8/17/75 Jean O'Connell - reimbursement for debt for electric (32.09) and telephone bill (40.71)		72.80 ✓
8/17/75 Jean O'Connell - reimbursement for debt for Montgomery Ward (34.16), Nichols Appliance Center (13.25) and Lord and Taylor (18.90)		66.31 ✓
8/17/75 Jean O'Connell - reimbursement for funeral bill		1,148.41 ✓
8/17/75 Jean O'Connell - reimbursement for payment to priest (30) and debt for doctor (10)		40.00 ✓
11/17/75 Fairfax Memory Gardens, Inc., marker		810.16 ✓
1/7/76 Clerk of Court - copies of qualification		2.00 ✓
1/12/76 Jean O'Connell - reimbursement to payment to attorney		210.00
EXPENSES PAID FOR BY WIFE:		
Narfe dues - debt	1.50 ✓	
County of Fairfax - personal property tax	\$ 53.75 ✓	
1976 Real Estate tax	1,306.00 ✓	
Stanton, Minter and Bruner, preparation of Federal estate and Virginia inheritance return	1,000.00	
Internal Revenue Service - Social security for maid	10.21	
Internal Revenue Service - Federal estate tax	973.77 ✓	
Department of Taxation - Virginia inheritance tax	<u>1,251.12</u> ✓	4,596.35
TOTAL		

Vouchers in support of said disbursements are submitted herewith.

Date

Jean M. O'Connell
(Signature and Title)

(Signature and Title)

ESTATE OF Harold M. O'Connell PAGE 3
 First ACCOUNT OF Jean M. O'Connell
 Executrix
 COVERING PERIOD FROM May 26, 1975 TO May 26, 1977

DESCRIPTION	Assets Received (or on hand)	Disbursements
ASSETS REMAINING AT MAY 26, 1977:		
1/2 interest in residence and 3.3365 a. at 6541 Franconia Road, Springfield, Virginia	\$40,681.00	
1/2 interest in 15 acres of unimproved land, Accotink Station, Fairfax County, Va.	37,500.00	
1210 shares 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. Due to Jean M. O'Connell for advances	500.00 <u>(7,049.77)</u>	83,507.75
TOTAL		
	94,695.94 ✓	94,695.94 ✓

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 there with.
 GIVEN under my hand this 28th day of July, 19 78.
Robert J. McCandlish, Jr.
 Commissioner of Accounts as aforesaid.

I, JAMES E. ROOFNAGLE, Clerk of the Circuit Court of Fairfax County, Virginia do hereby certify that the foregoing Account or Report has been filed in my office for more than fifteen days and that no objections have been filed thereto within the time provided pursuant to the provisions of Sections 26-24 and 26-25 of the Code of Virginia.
 Done at Manassas, Virginia, this 29th day of July, 1978.
 By: *James E. Roofnagle*
 Deputy Clerk

Vouchers in support of said disbursements are submitted herewith.
2-1-78
 Date
Jean M. O'Connell, Exec
 (Signature and Title)

 (Signature and Title)



ROBERT J. MCCANDLISH, JR.
COMMISSIONER OF ACCOUNTS

COMMISSIONER'S OFFICE

CIRCUIT COURT OF FAIRFAX COUNTY

4069 CHAIN BRIDGE ROAD

TELEPHONE 273-2440

FAIRFAX, VIRGINIA 22030

November 7, 1977



STEPHEN L. BEST
DEPUTY COMMISSIONER OF ACCOUNTS

Jean M. O'Connell
6541 Franconia Road
Springfield, VA 22151

RE: Estate of Harold A. O'Connell

Dear Mrs. O'Connell:

You qualified as administrator of the above estate on June 18, 1975. By law you are required to file, in this office, an inventory of the assets within four months of the date of qualification. You are also required to file an accounting of the administration of the estate within sixteen months of the date of qualification.

Our records indicate that neither of the above has been filed. Please submit the inventory and account, together with all vouchers in support thereof, at your earliest convenience to avoid further action on the part of this office.

Sincerely yours,

Stephen L. Best

Stephen L. Best
Deputy Commissioner of Accounts

Ans. Nov. 18, 1977 & asked for extension to Feb. 1, 1978

Called Nov. 30 - 77 - Should have received pkt. of papers at time of qualifying as administrator.

Feb. 1, 1978. Mission accomplished !!!

1980



ROBERT J. MCCANDLISH, JR.
COMMISSIONER OF ACCOUNTS

COMMISSIONER'S OFFICE

CIRCUIT COURT OF FAIRFAX COUNTY

4069 CHAIN BRIDGE ROAD

TELEPHONE 273-2440

FAIRFAX, VIRGINIA 22030



STEPHEN L. BEST
DEPUTY COMMISSIONER OF ACCOUNTS

DATE: April 21, 1980
RE: Estate of Harold A. O'Connell
FIDUCIARY NO. 21840
QUALIFICATION DATE: June 18, 1975

Mrs. Jean M. O'Connell
Executor
6541 Franconia Road
Springfield, Virginia

Our records indicate that you qualified on June 18, 1975. By law you are required to file, in this office, an accounting of the administration of the estate within sixteen months of the date of qualification, and every year thereafter until the estate has been closed.

Our records indicate that you previously filed an accounting on 020178 and that another accounting is/was due on October 18, 1978. Please submit the accounting at your earliest convenience to avoid further action on the part of this office.

If your records reflect inconsistencies with ours, please telephone Mrs. Wiley of our office at the above number.

Very truly yours,

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

*7ms
Caroline Eligdon
will send for her &
copy. 4/26*

*Sent 2 copies
of accounting
4-10-81
RJM/os6*

1981

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)	
	<u>\$83,507.75</u> ✓	

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	
2/17/78	86.87	
5/19/78	161.33	
5/19/78 capital gain	111.69	
8/18/78	87.99	
11/17/78	87.99	
2/16/79	100.56	
5/18/79	163.41	
5/18/79 capital gain	276.54	
8/17/79	104.00	
11/16/79	104.00	
2/15/80	117.00	
	<u>1,938.12</u> ✓	

New Virginia Bancorporation:

7/14/77	\$ 23.10	
10/15/77	23.10	
1/16/78	31.30	
4/15/78	26.62	
7/15/78	30.32	
10/14/78	30.32	
1/15/79	30.32	
4/15/79	30.32	
7/14/79	30.32	
10/15/79	30.32	
1/15/80	36.44	
4/15/80	35.64	
7/15/80	35.64	
10/15/80	35.64	
	<u>429.40</u> ✓	

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

BOOK 298 PAGE 135
PAGE 2

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

Description	Assets received or on hand	Disbursements
RECEIPTS: (Continued)		
<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	
Proceeds of sale of stock	8,867.06	
Balance of checking account	<u>723.57</u>	
		10,841.29 ✓ 10,841.29

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 3

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

Description	Assets received or on hand	Disbursements
<u>DISTRIBUTION OF PERSONAL PROPERTY TO WIFE</u>		\$ 500.00
<u>ASSETS REMAINING AT DECEMBER 31, 1980:</u>		
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
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)
RmC

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 this Court and that the same has been placed to the credit of the estate of the decedent in accordance with the provisions of the Code of Virginia.
Witness my hand and the seal of the Court at Fairfax, Virginia, this 26th day of June, 1981.
By: *James E. Hootnagle*
Deputy Clerk

1984

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.

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

1985

**False
Lost
Account**

Copy

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 1

SECOND ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX (Fid. No. 21840)
COVERING PERIOD FROM MAY 26, 1977 TO DECEMBER 31, 1980

Description	Assets received or on hand	Disbursements
<u>ASSETS REMAINING ON HAND AT MAY 26, 1977, PER FIRST ACCOUNT:</u>		
One-half interest in residence and 3.3365 a. 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	
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	<u>(7,049.77)</u>	
	<u>\$83,507.75</u>	

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	
2/17/78	86.87	
5/19/78	161.33	
5/19/78 capital gain	111.69	
8/18/78	87.99	
11/17/78	87.99	
2/16/79	100.56	
5/18/79	163.41	
5/18/79 capital gain	276.54	
8/17/79	104.00	
11/16/79	104.00	
2/15/80	<u>117.00</u>	1,938.12

New Virginia Bancorporation:

7/14/77	\$ 23.10	
10/15/77	23.10	
1/16/78	31.30	
4/15/78	26.62	
7/15/78	30.32	
10/14/78	30.32	
1/15/79	30.32	
4/15/79	30.32	
7/14/79	30.32	
10/15/79	30.32	
1/15/80	36.44	
4/15/80	35.64	
7/15/80	35.64	
10/15/80	<u>35.64</u>	429.40

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 2

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

Description	Assets received or on hand	Disbursements
<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	
Proceeds of sale of stock	8,867.06	
Balance of checking account	<u>723.57</u>	
		10,841.29
		10,841.29

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 3

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

Description	Assets received or on hand	Disbursements
<u>DISTRIBUTION OF PERSONAL PROPERTY TO WIFE</u>		\$ 500.00
<u>ASSETS REMAINING AT DECEMBER 31, 1980:</u>		
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
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</u> <u>\$99,726.25</u>

Respectfully submitted,

S

Jean M. O'Connell, Executrix

1/3/85
Date

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

(Fid. No. 21840)

PAGE 1

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

Description	Assets received or on hand	Disbursements
<u>ASSETS REMAINING ON HAND AT MAY 26, 1977, PER FIRST ACCOUNT:</u>		
One-half interest in residence and 3.3365 a. 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	
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	<u>(7,049.77)</u>	
	<u>\$83,507.75</u>	

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	
2/17/78	86.87	
5/19/78	161.33	
5/19/78 capital gain	111.69	
8/18/78	87.99	
11/17/78	87.99	
2/16/79	100.56	
5/18/79	163.41	
5/18/79 capital gain	276.54	
8/17/79	104.00	
11/16/79	104.00	
2/15/80	<u>117.00</u>	1,938.12

New Virginia Bancorporation:

7/14/77	\$ 23.10	
10/15/77	23.10	
1/16/78	31.30	
4/15/78	26.62	
7/15/78	30.32	
10/14/78	30.32	
1/15/79	30.32	
4/15/79	30.32	
7/14/79	30.32	
10/15/79	30.32	
1/15/80	36.44	
4/15/80	35.64	
7/15/80	35.64	
10/15/80	<u>35.64</u>	429.40

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 2

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

Description	Assets received or on hand	Disbursements
<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 Bankcorporation - 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	
Proceeds of sale of stock	8,867.06	
Balance of checking account	<u>723.57</u>	10,841.29
		10,841.29

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

ESTATE OF HAROLD M. O'CONNELL

PAGE 3

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

Description	Assets received or on hand	Disbursements
<u>DISTRIBUTION OF PERSONAL PROPERTY TO WIFE</u>		\$ 500.00
<u>ASSETS REMAINING AT DECEMBER 31, 1980:</u>		
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
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</u> <u>\$99,726.25</u>

Respectfully submitted,

Jean M. O'Connell

Jean M. O'Connell, Executrix

Jan. 3, 1985
Date

False Final Account

(The false final two page account to Jean O'Connell is the one page third account to the Court)

ESTATE OF HAROLD M. O'CONNELL

THIRD ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX
FOR THE PERIOD JANUARY 1, 1981 TO DECEMBER 31, 1984

	<u>Receipts</u>	<u>Disbursements</u>
<u>ASSETS REMAINING ON HAND AT DECEMBER 31, 1980 PER SECOND ACCOUNT</u>		
One-half interest in residence and 3.3365 acres of 6541 Franconia Road, Springfield, Virginia	\$40,681.00	
One-half interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia	37,500.00	
254 shares, New Virginia Bancorporation	1,952.50	
Certificate of deposit - Washington-Lee Savings and Loan Association	3,852.08	
Due to Jean M. O'Connell for net advances	<u>(3,050.27)</u>	
	<u>\$80,935.31</u>	

RECEIPTS:

<u>Dividends, New Virginia Bancorporation:</u>		
1/15/81	\$ 32.34	
4/15/81	32.34	
7/15/81	37.24	
10/15/81	37.24	
1/15/82	37.24	
4/15/82	37.24	
7/15/82	<u>37.24</u>	250.88
<u>Stock dividend - New Virginia Bancorporation:</u>		
5% - 12 shares received - Cash for fraction		8.12
<u>Sale of 266 shares New Virginia Bancorporation:</u>		
Proceeds at redemption @ \$20/share	\$5,320.00	
Less inventory value	<u>1,952.50</u>	3,367.50
<u>Interest, Washington-Lee Savings and Loan Association:</u>		
1981 - Matured 9/19/81		215.26

TAXES PAID BY WIFE:

1981 real estate tax	\$1,458.21	
1982 real estate tax	1,770.73	
1983 real estate tax	1,770.72	
1984 real estate tax	2,023.93	
Second account filing fee 5/15/81	23.00	
Preparation of second account	<u>325.00</u>	7,371.59

AMOUNTS PAID TO WIFE:

New Virginia Bancorporation - dividends	\$ 250.88	
Sale of fractional share	8.12	
Proceeds of sale of stock of New Virginia Bancorporation	5,320.00	
Proceeds of certificate of deposit at maturity	<u>4,067.34</u>	9,646.34
		9,646.34

ASSETS REMAINING AT DECEMBER 31, 1984:

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>
	<u>\$94,423.41</u>	<u>\$94,423.41</u>

Respectfully submitted,

Jean M. O'Connell, Executrix

*Copy
of account delivered by hand
to Office of Commissioner
of Accounts - Jan 23, 1985
for paid.*

ESTATE OF HAROLD M. O'CONNELL

COMPUTATION OF PERCENTAGE INTEREST IN 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>

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	\$148,614
Federal estate and Virginia inheritance tax	2,225
Net estate	\$146,389
Less property passing directly	63,580
Net probate estate	\$ 82,809
Marital deduction	\$74,307
Less passing directly	<u>63,580</u>
Residuary estate	(12.95% wife's share) <u>10,727</u>
	(87.05% Trust share) <u>\$ 72,082</u>

Retain this copy for your Records.

From Edward White -
The final filing for HAO'C.
Estate

AMOUNTS PAID TO WIFE:

New Virginia Bancorporation - dividends
Sale of fractional share
Proceeds of sale of stock of New Virginia
Bancorporation
Proceeds of certificate of deposit at
maturity

ASSETS REMAINING AT DECEMBER 31, 1984:

One-half interest in residence and
3.3365 acres at 6541 Franconia Road,
Springfield, Virginia
One-half interest in 15 acres of unimproved
land, Accotink Station, Fairfax, Virginia
Due to Jean M. O'Connell for net advances

*copy
Original delivered by hand
to Office of Commissioner
of Accts. Nov. 23, 1985, checked
\$500 fee paid.*

Respe

Jean

Third Account

ESTATE OF HAROLD M. O'CONNELL

THIRD ACCOUNT OF JEAN M. O'CONNELL, EXECUTRIX
FOR THE PERIOD JANUARY 1, 1981 TO DECEMBER 31, 1984

FD. # 21840
QUAL 6/12/85
FILED 1/23/85
PAID 7/35/85
TAPED 1/16
POSTED 2/4/85

	<u>Receipts</u>	<u>Disbursements</u>
ASSETS REMAINING ON HAND AT DECEMBER 31, 1980 PER SECOND ACCOUNT		
One-half interest in residence and 3.3365 acres of 6541 Franconia Road, Springfield, Virginia	\$40,681.00	
One-half interest in 15 acres of unimproved land, Accotink Station, Fairfax, Virginia	37,500.00	
254 shares, New Virginia Bancorporation	1,952.50	
Certificate of deposit - Washington-Lee Savings and Loan Association	3,852.08	
Due to Jean M. O'Connell for net advances	(3,050.27)	
	<u>\$80,935.31</u> ✓	
RECEIPTS:		
Dividends, New Virginia Bancorporation:		
1/15/81	\$ 32.34	
4/15/81	32.34	
7/15/81	37.24	
10/15/81	37.24	
1/15/82	37.24	
4/15/82	37.24	
7/15/82	<u>37.24</u>	250.88 ✓
Stock dividend - New Virginia Bancorporation: 5% - 12 shares received - Cash for fraction		8.12
Sale of 266 shares New Virginia Bancorporation: Proceeds at redemption @ \$20/share	\$5,320.00	
Less inventory value	<u>1,952.50</u>	3,367.50 ✓
Interest, Washington-Lee Savings and Loan Association: 1981 - Matured 9/19/81		215.26
EXPENSES PAID BY WIFE:		
1981 real estate tax	\$1,458.21 ✓	
1982 real estate tax	1,770.73 ✓	
1983 real estate tax	1,770.72 ✓	
1984 real estate tax	2,023.93 ✓	
Second account filing fee 5/15/81	23.00	
Preparation of second account	<u>325.00</u> ✓	7,371.59 ✓
AMOUNTS PAID TO WIFE:		
New Virginia Bancorporation - dividends	\$ 250.88	
Sale of fractional share	8.12	
Proceeds of sale of stock of New Virginia Bancorporation	5,320.00	
Proceeds of certificate of deposit at maturity	<u>4,067.34</u>	9,646.34 ✓
ASSETS REMAINING AT DECEMBER 31, 1984:		
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		(775.52) ✓
	<u>\$94,423.41</u> ✓	<u>\$94,423.41</u> ✓

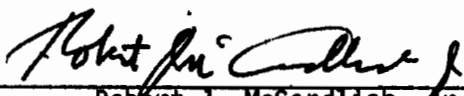
Respectfully submitted,

Jean M. O'Connell
Jean M. O'Connell, Executrix (WIFE)

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 13th day of August, 1986.



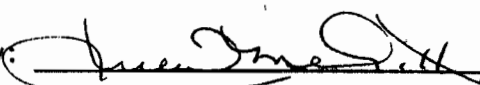
Robert J. McCandlish, Jr.
Commissioner of Accounts
Fairfax County, Virginia

IN THE CLERK'S OFFICE OF THE CIRCUIT COURT OF THE COUNTY OF FAIRFAX,
VIRGINIA:

I, WARREN E. BARRY, Clerk of the Circuit Court of Fairfax County, Virginia, do hereby certify that the foregoing Account or Report has been filed in my office for more than fifteen days, and that no exceptions have been filed thereto, and the same is now recorded pursuant to the provisions of Section 26-33 and 26-35, of the Code of Virginia, as amended.

GIVEN under my hand this 8 day of September, 1986.

TESTE: WARREN E. BARRY, CLERK

By: 

Deputy Clerk



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

May 8, 1985

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

Re: Estate of Harold A. O'Connell

Dear Mrs. O'Connell:

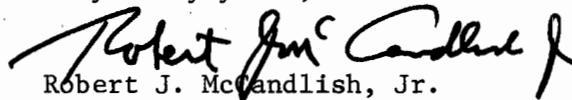
According to the inventory filed for the above estate the gross value was \$90,650.27 and under the terms of the will one-half of the estate goes to you as the "Marital Share" (one-half being the amount allowed the wife without estate tax by IRS) and the balance goes to the "Residuary Estate" which shall be held in trust by Anthony M. O'Connell, as Trustee, and the income paid to you and, in the sole discretion of the Trustee as to time and amount, the principal of the trust may be used for your support and maintenance.

This trust must be set up since we cannot ignore the will and at your death the balance in the trust goes to your three children or their issue. At this time, we don't know who that will be.

Please advise me what is being done to set up this trust. As a non-resident, Anthony M. O'Connell can act as Trustee only if a resident of Virginia qualifies with him or a Virginia resident is designated as an agent to receive notices and processes from the Court and the Commissioner of Accounts.

It is possible that an indemnification agreement can be worked out so the trust need not be funded, but this office should not advise you about such an agreement.

Very truly yours,


Robert J. McCandlish, Jr.
Commissioner of Accounts

RJM/jd

cc: Anthony M. O'Connell
6525 Clayton Avenue
St. Louis, Missouri 63139

Draft Account

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

ASSETS REMAINING ON HAND AT DECEMBER 31,
1984, PER THIRD ACCOUNT

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

(775.52)

TOTAL FOR WHICH TO ACCOUNT

\$77,405.48

RECEIPTS:

None

EXPENSES PAID BY WIFE:

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) 35.00

CLIENT'S DRAFT

For Review Purposes Only
Subject To Change

\$ 3,037.01

DISTRIBUTIONS:

Anthony M. O'Connell and Herbert Anderson
Higham, Trustees w/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

34,574.55

72,081.94

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
DISTRIBUTIONS: (Continued)		
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>
<u>TOTALS</u>	<u>\$77,405.48</u>	<u>\$77,405.48</u>
<u>ASSETS REMAINING</u>	<u>NONE</u>	

CLIENT'S DRAFT
 For Review Purposes Only
 Subject To Change

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>

CLIENT'S DRAFT
For Review Purposes Only
Subject To Change

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%

Summons

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,

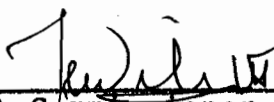
Jean M. O'Connell
6541 Franconia Road
Springfield, VA 22152

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
22nd 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, 1972 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...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

Fourth Account

IN THE CIRCUIT COURT OF FAIRFAX COUNTY, VIRGINIA

BOOK 381 PAGE 1574

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 # 21840

Number of this account Fourth and Final

(1st, 2nd, third, etc.)

Covering period from January 1, 1985

(date)

to April 30, 1986

(date)

DESCRIPTION

ASSETS RECEIVED
(or on hand)

DISBURSEMENTS

ASSETS REMAINING ON HAND AT DECEMBER 31,
1984, PER THIRD ACCOUNT

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

(775.52)

TOTAL FOR WHICH TO ACCOUNT

\$77,405.48

RECEIPTS:

None

EXPENSES PAID BY WIFE:

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) 35.00

\$ 3,037.01

DISTRIBUTIONS:

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 34,574.55

72,081.94

Totals carried forward

\$77,405.48

\$75,118.95

✓
FID. # 21840
QUAL. _____
FILED 8/11/86
PAID \$35 + 825 sum
TAPED _____
POSTED 9/8/86

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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
<u>DISTRIBUTIONS: (Continued)</u>		
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>
<u>TOTALS</u>	<u>\$77,405.48</u>	<u>\$77,405.48</u>
<u>ASSETS REMAINING</u>	<u>NONE</u>	

Vouchers in support of said disbursements are submitted herewith.

Date: August 6, 1986

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

The appropriate vouchers and filing fee MUST accompany this account

ESTATE OF HAROLD M. O'CONNELLCOMPUTATION OF ASSETS TO BE TRANSFERRED TO RESIDUARY TRUSTPROBATE 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>

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	\$148,614
Federal estate and Virginia inheritance tax	2,225
Net estate	\$146,389
Less property passing directly to wife	63,580
Net probate estate	\$ 82,809
Marital deduction	\$74,307
Less passing directly	<u>63,580</u>
	10,727
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%

AGREEMENT

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THIS AGREEMENT, made this 23 day of Jan., 1986 by and between JEAN M. O'CONNELL and ANTHONY M. O'CONNELL and HERBERT ANDERSON HIGHAM, Trustees, provides:

WHEREAS, under the Will of the late HAROLD A. O'CONNELL, which Will has been admitted to probate among the records of the Circuit Court of Fairfax County, certain property was left to ANTHONY M. O'CONNELL, Trustee, upon the terms and conditions of the Trust set forth in the aforesaid Will;

WHEREAS, ANTHONY M. O'CONNELL is not a resident of the Commonwealth of Virginia and HERBERT ANDERSON HIGHAM has qualified as Co-Trustee in this case;

WHEREAS, the corpus of the Trust, as presently constituted, consists of a 46.0994 percent ownership of two parcels of real estate located in Fairfax County, Virginia, the first being known as 6541 Franconia Road, and is the residence of JEAN M. O'CONNELL, the second being fifteen (15) acres of land located in Accotink Station, identified as Map Reference number 090-4-01-0017;

WHEREAS, it is the desire of the parties to fund the Trust as set forth in the Will and to provide security for JEAN M. O'CONNELL, and stability for the Trust;

IT IS HEREBY AGREED that in return for mutual promises as consideration for this agreement, the parties agree to the following:

1. The Co-Trustees, by their signatures hereupon, acknowledge receipt of the 46.0994 percent ownership of the two parcels referred to above.
2. JEAN M. O'CONNELL hereby agrees that she is the owner of the remaining 53.9006 percentage interest of the two parcels referred to above.

3. JEAN M. O'CONNELL hereby agrees that she will at all times pay the real estate taxes and other costs of maintaining these two parcels of property.

4. The Trustees hereby agree that during the life of JEAN M. O'CONNELL, they will not sell or attempt to sell by partition or otherwise, either of the two tracts of property without the written permission of JEAN M. O'CONNELL.

5. The Trustees agree that if either property is sold during the life of JEAN M. O'CONNELL she will be reimbursed from the sale proceeds the principal of all real estate taxes on that property paid by her which are attributable to the percentage ownership of the Trust.

In all other respects, the parties hereto agree that they are bound by the terms of the Will and Trust established therein.

Jean M. O'Connell

JEAN M. O'CONNELL

Anthony M. O'Connell

ANTHONY M. O'CONNELL

Herbert Anderson Higham


HERBERT ANDERSON HIGHAM

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 18th day of September, 1986.



Robert J. McCandlish, Jr.
Commissioner of Accounts
Fairfax County, Virginia

IN THE CLERK'S OFFICE OF THE CIRCUIT COURT OF THE COUNTY OF FAIRFAX,
VIRGINIA:

I, WARREN E. BARRY, Clerk of the Circuit Court of Fairfax County, Virginia, do hereby certify that the foregoing Account or Report has been filed in my office for more than fifteen days, and that no exceptions have been filed thereto, and the same is now recorded pursuant to the provisions of Section 26-33 and 26-35, of the Code of Virginia, as amended.

GIVEN under my hand this 15th day of October, 1986.

TESTE: WARREN E. BARRY, CLERK

By: 

Deputy Clerk