Philip Shalloway Out

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

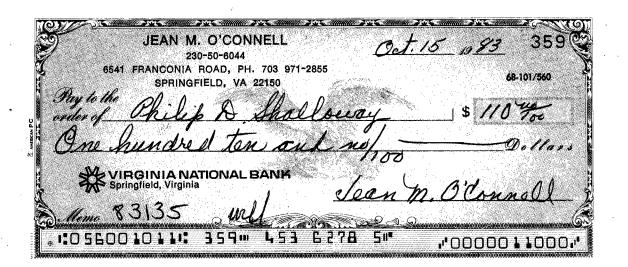
Conference

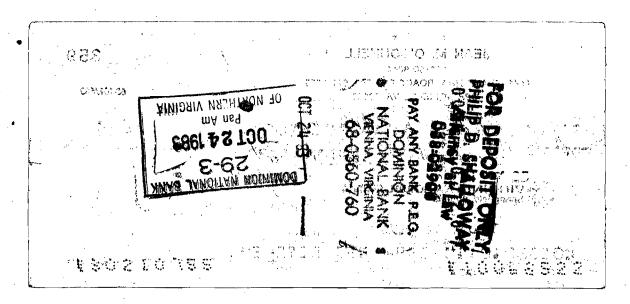
1.1

\$110.00

TOTAL DUE

\$110.00





VIRGINIA 3

COMMISSIONER OF ACCOUNTS CIRCUIT COURT OF FAIRFAX COUNTY

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

QUALIFICATION DATE: June 18, 1975

SUMMO	NS	
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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 day of <u>Dwember</u>, 1984.

(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.



CIRCUIT COURT OF FAIRFAX COUNTY

4069 CHAIN BRIDGE ROAD

TELEPHONE 385-0268

FAIRFAX, VIRGINIA 22030



JESSE B. WILSON, III

1 F	Date:	December 26, 1984
	Re:	Estate of Harold A. O'Connell
		Fiduciary No. 21840
	 ,	

Col.	Cleme	nt J.	Wal	1	
<u>3219</u>	Highl	and L	ane		
Fair	fax, V	A 22	2031		

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; Harald A.	SUMMODS
21840	Account to provide or both First special and a second
Sent to Shering: 11-15-84	IA.
Sent to Shering: 11-15-84	
Summas served: 11-16-84	
due action: 12-16-84 ext 1-31-9	25

Shalloway 941-3700 That I called Com. of acts re Dec. 15th not hov. 15 That Sure see the acet. tomorous at 8:30 and the sect, will be filed before Jan. 3/st. Iyee a a bill that must have been a mistake of mo Wall got the extension but Alter I make file the accting I would like to consider petitioning to have the dause removed from the will, Best what is bost., Week concelled,

Will and estate papers of D.A. O'Connell. to Mr. Shalloway. Please do what is necessary to seally. finish up the estate details of my husband. St. A. O'Connell. Well, estate filings, tap forms and IRS letter of estate tex acceptance are included. Thenk you seen O'Connell. 12-18-84

the want are her a give of A second to the second

6541 FRANCONIA ROAD

P.S. notice from Sheriff 13/15/84 and \$500 service check encluded.

19 Dec 84 - file received from electron PDS
20 Dec 84 - file seron to Cycu -Extension to 3 Jan 1985 granted by Com Jacks

Will WB 201-96 Firt & Hein WB 201-110 In vertlary WB 240-804

Real Estale (both panels)

little held as tements interest in Just Accounting block of approved (26 A) and 75 to 26 May 1979 4324/30

Just Accounting block of approved (26 A) and 75 to 26 May 17/3 31 Da 1985 (26 May 17/3 31 Da 1986)

Just Accounting block of block filed 1980- Im cold delivered them 1988

941-3700

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.
- 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 well.

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 34d day of 5am, 1985, in the County of Fairfax, Commonwealth of Virginia.

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

Clement floal 3219 Highland Wang 2031

STATE OF VIRGINIA COUNTY OF FAIRFAX, to-wit:

personally appeared JEAN M. O'CONNELL, Kellie A. Jourses, Milip 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'loundle
JEAN M. O'CONNELL
William a Johnson
Witness) Holling
Clemon Hoall
Witness
Subscribed, sworn and acknowledged before me by JEAN M.
O'CONNELL, the Testatrix, and Louis A. Januson,
Philip D. Shalloway, and Cleanent J. WALL.
witnesses, this 3 M day of January , 1985.
Dagarlo Sace
NOTARY PUBLIC
My Commission Expires: 11/3/86

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 654l 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

150.00

BALANCE DUE ON ACCOUNT

\$750.00

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

January 16, 1985

Mrs. Jean M. O'Connell 654l 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.

over

Philip D. Shalloway

Jan. 23, 1985

Copy of cheek made and sent,

Note added:

"Its 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 renderstand how it could be reported missing by your office."

Related topic: False lost account

SUBTRACTIONS ADDITIONS BALANCÉ FORWARD HEM NO OR PARSACTION DATE AMOUNT OF DEPOSIT DESCRIPTION OF TRANSACTION AMOUNT OF PAYMENT OR WITHORAWAL I-875 95 V Cabuci Howard 25 12 707 124 95 John 25 705 124 25 75 (466t) 109 100 41 TO Decoker 179 41 110 525 5 4 V TO annuity 150 102 44 712 ~: (-22 117 06 W P Woodson Co. 17 20 V 63 10 000 2717 72 DESCRIPTION OF TRANSACTION OH WITHORAWAL + F 1392 001 am. Consdesse leve. 1392 20 -49 719 20 20 720 FOR Louis cake Des 500 122 4000 of Va divident 50 TO (Costi 14 100 35 54750 9 1800 26 508 i sof lech 38 101 Sanambule 15 fee

987

This copy for my file. Jean O'Connell Copy of note pout to Mr. Shalloway 3/3/86 To: Mr. Philip Shalloway 1200 10 20 Little River Turnpike annandale, Va. 22150 From: Jean O'Connell 6541 Franconia Road Springfield. Va. 22150 I would appreciate it if. you would seed me the remaining papers you have of mene including the IRS notice of estate tay acceptonce and the notice from the Tx. 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 654l 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,

hilip D! Shalloway

PDS/mb

cc: Clement J. Wall

ATTORNEY AND COUNSELLOR AT LAW

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POST OFFICE DRAWER 450

TELEPHONE (703) 941-3700

Mrs. Jean M. O'Connell 654l Franconia Road Springfield, VA. 22150 February 14 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		150.00
BALANCE DUE ON ACCOUNT		\$750.00
Credit from Clement J. Wall Credit on previous payment (*)		100.00 110.00
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 25,1485 Hear Mr Shalloway. 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 mend that I could trust you implicitly to halp me file an estate accounting. I am sorry that the issue has bleome so confused. The enclosed cheek \$50-I feel more than covers the time speciton what actually was useful to my estate accountung. That is calling the Com. of accounts office for a time ou time the Shereff's office was late in delivering thereotics Jean O'Connell

Form PP-601 The Drawing Board Inc., Box 220505, Dallas, Texas

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,

PDS/mb Encl.

Pay to the order of Chilip Associated Sovan Bank, N.A., Springfield, Wrginia Metho 1:0560010111:75101453 6278	For 25 19 85 751 Section of the sec
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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 31 10 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

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 April 30

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

	BE SURE	TO DEDUCT CHARGES THAT AFFECT YOUR ACCOUNT	SUBTRACTIONS			ADDITIONS		BALANCE FORWARD		
TEM NO OR TRANSACTION	DATE	DESCRIPTION OF TRANSACTION	AMOUNT OF PAYMENT OR WITHDRAWAL (-)		✓'	01345B	AMOUNT OF DEPOSIT OR INTEREST (+)		150	4=
		TO correction -5-3 deposit	250				93	98	273	98
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ATTORNEY AND COUNSELLOR AT LAW

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TELEPHONE (703) 941-3700

Mrs. Jean M. O'Connell 6541 Franconia Road Springfield, VA. 22150 As of June 30

1085

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

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

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

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 10 85

FOR PROFESSIONAL SERVICES RENDERED

BALANCE DUE ON PREVIOUS BILLING

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