

MEMORANDUM

January 14, 1998

To: T. Jeremy Gunn  
Tom Samoluk

From: Kim A. Herd

Subject: Estate of Harold and Evelyn Lincoln (Summary of information)

BACKGROUND INFORMATION

Evelyn and Harold Lincoln drafted their wills on August 12, 1994. Essentially, Harold and Evelyn both had identical wills, each leaving everything to the other, and then to a list of Specific Beneficiaries. Below, I have listed each of these beneficiaries and their bequests in some detail. I have also provided some background information on the beneficiaries' relationships with the Lincolns and their dealings with the Review Board.

Evelyn died on May 11, 1995 and Harold died on June 26, 1995. The Lincolns appointed Stephen Blakeslee as their Personal Representative, and he retained James Salter as his attorney. Harold Lincoln's will entered probate on July 17, 1995, in the Circuit Court of Montgomery County, Maryland. Approximately two weeks after Harold Lincoln's funeral, Blakeslee apparently met with Robert White and Frank McGuire (another beneficiary) and the three of them inventoried the file cabinets and trunks that were listed for each of the beneficiaries under the terms of the will. Robert White prepared a hand-written list of these inventories and sent this to Blakeslee. Blakeslee then typed out a copy of the inventory, and sent it back to White for his signature. That letter was dated November 5, 1995.

One of the beneficiaries of the Lincolns' wills was Maria Ray, a daughter-like friend of the Lincolns. In the Fall of 1995, Stephen Blakeslee asked her to come to Maryland to collect some of her bequests.

Ray and her husband Clifford came to Maryland on November 1, 1995. At that time, Robert White took them out to dinner. According to Maria Ray, Robert White told them that "anything within the estate that the Rays didn't want, he would sell..." In the Spring of 1996, Maria Ray hired attorney Jeffrey Ray, who then wrote a letter to Blakeslee complaining about items Ray failed to receive pursuant to the terms of the will. Ray ultimately filed a Petition to Remove Blakeslee as the Personal Representative, on May 8, 1996 in the Circuit Court of Montgomery County

Court. On May 23, 1996, the Court set a hearing date for December 20, 1996.

In addition, Robert White filed suit against Maria and Clifford Ray on December 5, 1996, in U.S. District Court in Baltimore, MD. In his pleadings, White alleged that the Rays removed "items of Kennedy memorabilia" that were rightfully his under the terms of Lincoln's will. White also alleged that Maria Ray had informed Blakeslee about the items she had removed, and that when White asked Blakeslee to retrieve these items from Ray, he failed to do so.

Present at the court hearing in Montgomery County Circuit Court on December 20, 1996 were Stephen Blakeslee, Robert White, Maria Ray, Clifford Ray and their attorneys. The parties reached a settlement, the relevant terms of which are as follows: (1) that Stephen Blakeslee resign as Personal Representative and be replaced by Maria Ray (2) that all inventories, information report, and first account be approved as filed (3) that all parties including Maria Ray, Clifford Ray, Stephen Blakeslee, Jr. and Robert White shall not disclose to any other person the terms of the separate agreement between the parties. The court then sealed this separate agreement, and filed a Memorandum dated 12-20-96 which ordered the exhibit sealed. In a subsequent conversation I had with the Register of Wills (1-15-98), she stated that this procedure of sealing an exhibit was highly irregular. Another employee of the Register of Wills' office also stated that she has only seen this happen once before. According to this employee's recollection, the attorneys all met in chambers during a session which was not recorded, and reached an agreement. The parties then requested that the terms of this agreement be sealed, and the presiding judge granted their request.

The Review Board sent letters to each of the beneficiaries on February 5, 1997, explaining the Board's mandate and asking for them to assist us in determining whether they had any assassination records. Review Board staff was able to talk with most of these individuals. Their comments are summarized below.

## **BENEFICIARIES**

**1. John F. Kennedy Library**  
**Boston, MA**

**Bequests:** File Cabinets labeled "BS" and "NY" to be shipped to the Library intact for such purposes as the said Library shall determine."

**2. University of Pittsburgh**  
**Attn: James Knox, Irish Room**

**Bequests:** Presidential and United States Flags

3. Ms. Lisa Dale Norton  
Manzanita, Oregon

**Bequests:** File Cabinets labeled "LM" "BFE" and "DA"

**Background:** Niece of Evelyn Lincoln. She received only "Norton family" related items such as photos, etc. Norton visited the Kennedy Library in approximately April, 1996, when Megan Denoyers showed her a box filled with Evelyn's diaries.

4. Judge William H. Norton  
Osceola, NE

**Bequests:** Trunks labeled "GE" "SJ" "NAL" "to be shipped to him intact."  
Also received a portion of Colorado Real Estate

**Background:** Told Review Board staff he was "a close relative" of Evelyn Lincoln. He received three trunks from the Estate. He hadn't opened them and planned to open them in front of his local sheriff. Believes most of the items would be family-related.

Stated that Harold Lincoln told him that Evelyn Lincoln burned a lot of papers prior to her death.

5. Ms. Karen Ferguson  
Baltimore, MD

**Bequests:** Trunk labeled "MPS" to be "shipped to her intact." Glassware and Real Estate.

**Background:** Review Board staff attempts to interview her unsuccessful.

6. Mr. Frank McGuire  
Bethesda, MD

**Bequests:** File Cabinets marked "OI" and "QA" and trunks marked "W" and "CLC" (containing films and tapes) to be delivered to him intact

All future rights, benefits, income royalties, or other interests, of any kind, related to and flowing from, or connected with books authored by Evelyn Maurine Lincoln,

Miscellaneous other property (NBR) and cash

Named as Alternate Personal Representative

**Background:** Told Dave Montague he was “Alternate Executor” of the Lincolns’ estate, and the “literary heir” to Evelyn’s writings. Also stated that he has the manuscript from Evelyn Lincoln’s first work, as well as the novel she tried to publish. He also has “courtesy copies” of tapes from JFK interviews and programs.

McGuire is a writer and speaker who was a reporter during the JFK administration. He has also served as a consultant to CBS on terrorism and has lectured at the FBI Academy.

5. Mr. Robert L. White  
Catonsville, MD 21228

**Bequests:** File Cabinet labeled “ES” to “be shipped to him intact”

“Kennedy memorabilia, such as brief case, signing table, rocker and stereo, to be delivered to him”

**Background:** First contact was on January 27, 1997, by Brian Rosen and Dave Montague. White was initially cooperative and stated he wanted to talk in person rather over the phone.

Next conversation was with White’s attorney, David Glassman on January 27, 1997. On January 29, 1997, Glassman called again and stated that White was not in possession of any assassination related material. In a letter dated February 24, 1997, David Glassman again stated that “White did not receive nor was he in possession of any assassination-related artifacts and/or memorabilia originating from the Lincoln will or from any other source.”

On April 10, 1997, White and Glassman met with Brian Rosen and Dave Montague. According to White, after Evelyn Lincoln’s death, Mr. Lincoln

showed White where the file cabinets were located in the Lincolns' apartment, but they were unable to open any of the combination locks that sealed the cabinets. Approximately two weeks after Harold Lincoln was buried, White viewed the contents of all the trunks and file cabinets with Stephen Blakeslee and Frank McGuire. This was done at Blakeslee's request, for the purpose of creating an inventory and appraisal of the estate. Mr. White described his review of the contents of the trunks and cabinets as a "cursory inspection." He stated that he opened all the trunks and cabinets but only "eyeballed" individual items, most of which were in piles or files, and that he did not sort through them. White stated that soon after the inspection he forwarded his notes and blank business stationary to Blakeslee, who created the final letter, inventory and appraisal. White merely signed the papers at Blakeslee's request. White claims that Blakeslee changed the nomenclature system for the file cabinets from letters to numbers. White stated that his inventory did not reveal any items related to the assassination, other than the diaries or appointment books that went to the JFK Library. He described the diaries as day journals with red covers packed together in a single, average-sized box. During this conversation, White stated that he was afraid that the Rays removed several boxes with items before returning to Florida.

6. Mr. Stephen G. Blakeslee, Jr.  
Berryville, VA

**Bequests:** File Cabinet "AE"

Lincolns' wills named him Personal Representative

**Background:** ARRB first made contact with Blakeslee on January 9, 1997. He had been personal friends with the Lincolns for many years. He told Dave Montague that Robert White is a collector of JFK memorabilia and is attempting to establish a (type of) JFK museum in Annapolis, MD, According to Blakeslee, White has approximately 100,000 plus items in his collection. Blakeslee described White as "a nice guy" who may be a useful contact for the Board for assassination records. With regard to the distribution of the will, Blakeslee stated that he followed the will to the letter and shipped material "without really analyzing the contents," to the beneficiaries. Blakeslee gave White approximately one file cabinet and maybe a trunk. Blakeslee also stated that he still has a file cabinet which he is inventorying and is not comfortable stating isn't JFK material.

On April 2, 1997, Review Board staff again had a telephone conversation with Blakeslee. During that interview, Blakeslee stated that he had received one four-drawer file cabinet from the Lincolns. He stated that he would conduct a thorough examination of the materials and get back to Brian Rosen as soon as possible. It is unclear from the available reports, whether he ever did get back to the Review Board. According to Blakeslee, his review of the contents of the estate was very cursory and was done to the extent necessary to transfer the items to the correct beneficiary. He confirmed that both he and Frank McGuire were present at the inventory and appraisal conducted by Robert White.

On May 22, 1997, Review Board staff again telephoned Blakeslee for the purpose of following up on statements made by Robert White and Maria Ray.

During this conversation, Blakeslee stated that he had two appraisals done for the estate. The first, by Stephanie Kenyon, did not involve the contents of the trunks or file cabinets (but rather dealt with household furniture, china, glassware, etc.). The other one was prepared by White. Blakeslee confirmed White's statement that Blakeslee prepared the typed version of White's inventory (using White's original notes) and then submitted it to White for his signature. Blakeslee stated that he would look for White's original notes. Blakeslee stated that Ray took a few items back to Florida, but not numerous boxes as alleged by White.

#### 7. Goodwill Industries

Bequests: Linens and clothing.

#### 8. Mr. James Norton Ericson, NE

Bequests: Colorado Real Estate

Review Board has not made contact with him, since he was not the beneficiary of any items relevant for our purposes.

#### 10. Ms. Maria Ray and Mr. Clifford Ray Cocoa Beach, FL

Bequests: Residual Beneficiaries

**Background:** Maria Ray has been very reluctant to cooperate with the Review Board. On April 17, 1997, Dave Montague and Brian Rosen spoke with Ray and she told them that she was skeptical about the Review Board's legitimacy, and was afraid to violate any court orders by speaking with the Board. Ray did state however, that she had received two boxes of material, and pieces written about the assassination "might be related." She then stated that these materials were "already public." Ray denied that she had access to any open trunks or file cabinets. Ray also claimed she has no first hand knowledge of any other beneficiaries' material. She then referred Dave and Brian to her attorney, John Noble.

Ray and Noble again spoke with Brian and Dave on May 16, 1997. At the end of the conversation, she stated that she did not want to talk with the ARRB anymore unless needed. During the conversation, she stated that she had met the Lincolns in about 1973 when she was a teenager. She became like an adopted daughter to the Lincolns. At one point, while Evelyn Lincoln was still living, Ray saw two file cabinets that had a note saying they should go to the Kennedy Library. Ray did not see or know the contents of these cabinets.

Ray reported that after Blakeslee had White's inventory made, Blakeslee called Ray and asked her to visit Maryland to view the estate. Ray told Blakeslee she didn't want to visit, but he told her she needed to because "it would be too much work for him to box things himself for her." Ray did travel to the Lincoln's apartment on November 1, 1995. At that time, she met with Blakeslee and he gave her a key. She also stated that White took her and her husband out to dinner. On that occasion, White told the Rays that anything within the Estate the Rays didn't want, White would sell.

Ray stated that she didn't have access to any trunks or file cabinets and has no idea what others received. The file cabinets were kept locked, and Blakeslee had the keys. Ray did not receive any materials from White's inventory. By the time Ray became administrator of the Estate, all the materials had been distributed. Harold Lincoln told Maria Ray that Evelyn Lincoln had destroyed the diaries.

**NOTE:** Both wills contain a clause which states as follows: "All of my household furnishings in my apartment at the time of my death, such as, furniture, decorative accessories,.....and Kennedy memorabilia should be put up for sale

by a reputable company engaged in handling Estate Sales selected by my personal representative or her or his designee.”

**TIME LINE:**

- Aug. 12, 1994 Last Will and Testament drafted by Evelyn and Harold Lincoln
- May 11, 1995 Evelyn Lincoln Dies
- June 26, 1995 Harold Lincoln Dies
- July 17, 1995 Petition for Probate of Harold Lincoln’s Will Filed in Montgomery County, MD  
James W. Salter listed as attorney  
Stephen Blakeslee, Jr. listed as Personal Representative
- Aug. 5-14 ‘95 Around this time, White, Blakeslee and Frank McGuire inventory the Lincolns’ file cabinets and trunks
- Aug. 14, 1995 Certificate of Publication - Gazette
- Oct. 13, 1995 Stephanie Kenyon (hired by Blakeslee) to appraise the personal property (excluding any items in the file cabinets)  
(Amount is \$6,160)
- Oct. 17, 1995 Inventory filed (Amount - \$342,517)
- Oct. 18, 1995 Montgomery County Register of Wills sends James Salter notice regarding items which needed completion, including the need for an amended schedule in the event the initial figure of \$159,650 is no longer accurate.
- Nov. 1, 1995 Maria and Clifford Ray arrive in Maryland and stay at the Lincoln’s apartment. White takes the Rays out to eat and allegedly says that anything within the estate the Rays didn’t want, he would sell
- Nov. 9, 1995 Date of White’s Letter of Appraisal to Blakeslee  
Values the contents of Trunks and File Cabinets at \$159,650
- Nov. 15, 1995 Blakeslee and Salter estimate cash, life insurance and bank accounts at \$142,289.29

Feb. 14, 1996 Amended Inventory Filed (\$342,599)

Mar. 26, 1996 Letter from Jeffrey Ray (Maria Ray's Attorney) to Blakeslee claiming that Maria Ray did not receive: (1) African made stool; (2) **Mrs. Lincoln's wooden desk name plate** and (3) **Silver plated, wooden calendar displaying the month of the President's October Cuban missile crisis.**

April 17, 1996 First Interim Account filed

April 17, 1996 Blakeslee files Petition for Partial Payment of Fees and Commissions in the Circuit Court of Montgomery County, MD

April 18, 1996 Jeffrey Ray, Esq., files formal notice that he is the Rays' Attorney

May 1, 1996 Ray files Exception to Blakeslee's Petition for Partial Payment of Fees and Commissions in Montgomery County

May 8, 1996 Maria Ray files Petition for Removal of Personal Representative and Objection to Inventory and Accounting.

May 23, 1996 Montgomery County Court sets hearing date for Dec. 20, 1996

Oct. 15, 1996 Second Interim Account

Oct. 28, 1996 Jeffrey Ray files Motion to Withdraw as Counsel

Nov. 7, 1996 John Noble and Fred Goldman file formal notice that they are the new attorneys for Maria and Clifford Ray

Dec. 3, 1996 Court allows Jeffrey Ray to withdraw

Dec. 5, 1996 White files suit in Baltimore, MD against Maria and Clifford Ray - claiming that the Rays removed JFK memorabilia from the Lincolns' home during their stay on November 1, 1995.

Dec. 16, 1996 Blakeslee files his opposition to Ray's petition to remove him and contest the inventory and accounting

Dec. 20, 1996 Hearing held in Montgomery County Circuit Court. Initial presiding judge is Judge Donohue, who reveals that he knows Blakeslee socially, and ultimately

recuses himself. New judge is The Honorable Anne S. Harrington.  
Parties reach a settlement, and a Consent Order is filed.

Settlement Terms:

- (1) James Slater removed as counsel and replaced by John Noble
- (2) Blakeslee resigns and Maria Ray is appointed new Personal Rep.
- (3) All inventories, information report and first account are approved  
as filed.
- (4) Blakeslee ordered to turn over all estate-related documents to  
Maria Ray
- (5) Consent Order states that Maria Ray, Clifford Ray, Stephen  
Blakeslee and Robert White and their counsel shall not disclose to  
any other person, the terms of a separate agreement between the  
parties which shall be sealed by the court.
- (6) Judge Harrington files a Memorandum requesting a sealed  
exhibit to be filed (the terms of the agreement between the parties).

Dec. 20, 1996 White Dismisses his Complaint against the Rays.

Feb. 5, 1997 Review Board sends letters to beneficiaries

Sept. 18, 1997 First and Final Account

Oct. 6, 1997 Petition for Attorney's Fees

Nov. 13, 1997 Order of Court passing final account dated 11-7-97 (Gross Estate \$362,044.51) (Judge Rupp)

Nov. 13, 1997 Order of Court granting \$3,900 in fees





















