

Joe Shelby

The Undefeated Rebel

FOR MANY IN THE SOUTH, the war did not end immediately with the surrender of Gen. Robert E. Lee on April 9, 1865, at Appomattox Court House in Virginia. In the West, many Confederate troops and their commanders refused to capitulate, preferring to continue the fight or leave the country. One of those was noted Rebel cavalry Gen. J.O. Shelby. Rather than wave the white flag, he led several hundred of his men south into Mexico, choosing freedom there to life under the Union yoke.

By Clint Lacy

Joseph Orville Shelby was born in Lexington, Kentucky on Dec. 12, 1830 to one of the state's most influential families. At the age of five, Joseph (or J.O. as he would later famously be remembered) lost his father. His life was described by Henry Clay McDougal in 1911 as follows:

In boyhood there he was the play-fellow of his cousins, B. Gratz Brown and Frank P. Blair, all descended from a great lawyer named Benjamin Gratz, who was a contemporary and at the bar quite the equal of the great Henry Clay. Each of the three cousins named came to this state and in the Civil War attained unique national distinction: Shelby as a commander of Southern forces and later as a U.S. marshal, Blair as a soldier and U.S. senator; and Brown as a U.S. senator and later governor of Missouri.

[Both Blair and Brown were Unionist leaders in Missouri. Blair was partially responsible for the St. Louis massacre, which was the deciding factor for Shelby to join Confederate ranks. See more about the St. Louis massacre in TBR, July/August 2007.—Ed.]

McDougal adds that:

After completing his academic course at Transylvania University in Kentucky and at a Philadelphia college, Shelby came to Lafayette County, Missouri in 1849, participated in the border troubles of 1854-1860, and at the outset promptly entered the Southern Army in 1861. He had no military education, but had sense, scholarship, enthusiasm, courage, dash, and these attributes made him a natural soldier, a great leader of men.¹

In these aspects J.O. Shelby had many of the same characteristics of Nathan Bedford Forrest, who like Shelby, had no formal military training but rose through the Confederate ranks to become a general and great leader of men.

According to "Missouri Civil War 150," a website celebrating the sesquicentennial of the Civil War in Missouri:

Joseph Orville Shelby has been hailed by a biographer as "the Jeb Stuart of the West," while contemporaries likened him to Nathan Bedford Forrest. The nobility of Stuart's mind-set may resemble Shelby's, but most military historians consider Shelby, like Forrest, an untutored genius of leadership, organization, and tactics.

“Jo” Shelby was the child of Orville and Anna Boswell Shelby. Descended of noted planters and rope manufacturers in Kentucky and Tennessee, he was also related to Kentucky’s first governor, Isaac Shelby. Orville died when Jo was five, and in 1843 his mother married Benjamin Gratz. Jo’s stepfather was a wealthy Pennsylvanian who took pains to educate his stepson, sending him to Transylvania University.

In 1852, with his paternal inheritance, Shelby entered Waverly, Missouri’s busy commercial scene. Following his forebears’ example, the young man developed a hemp factory in Waverly, a sawmill at Dover and a 700-acre farm where slaves tended livestock, hemp and wheat. On a bluff overlooking Waverly he built a mansion, and became a man of substance and a confidant of such politically prominent figures as his second cousin Frank Blair, David Rice Atchison and Claiborne Fox Jackson. On July 22, 1858, Shelby joined a second cousin, Elizabeth N. Shelby, in a marriage blessed by seven children.

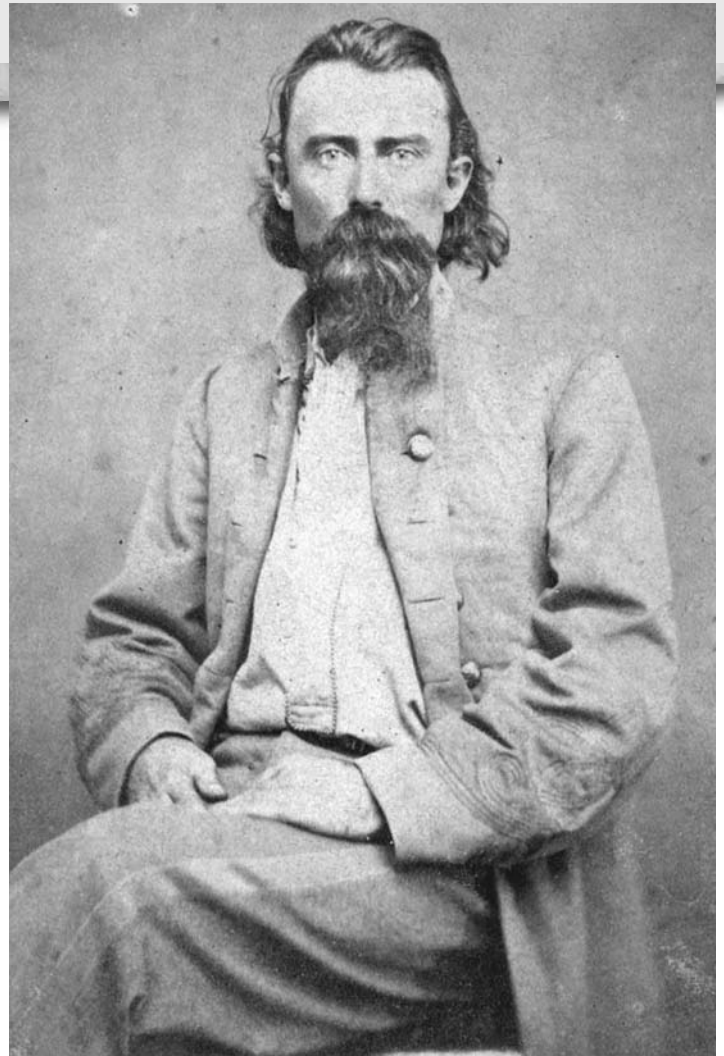
This was the decade of “Bleeding Kansas” and its border war, resulting from Missourians’ attempts to prevent another abolitionist bastion on their frontiers. Among the “ruffians” resisting the territory’s electoral processes was Shelby, acutely fearful he was living beyond his means and that abolition threatened his early ruin. As federal forces tipped the scales against pro-Southern Missourians, the turbulence was crippling western Missouri’s economy.²

In the book *Notable Southern Families*, authors Zella Armstrong and Lanie Preston Collup French offer the following description of Shelby: “General Shelby was a born leader of men. Brave, daring, chivalrous, and knew not the meaning of the word fear. He was the idol of his men and was to the Trans-Mississippi department what Forrest was to the East.”³

According to the University of Missouri:

Shelby was angered by the Camp Jackson Affair in St. Louis, which occurred on May 10, 1861. During the incident, Union Gen. Nathaniel Lyon’s militia fired upon a [group of civilians] and killed 28 people. In response, Shelby recruited a large number of men from Lafayette County, Missouri, to support the Confederacy by serving in the Missouri State Guard. Shelby and his troops fought at the Battle of Wilson’s Creek and later at the Battle of Pea Ridge, Arkansas.⁴

In late April, 1863, Shelby and his men accompanied Gen. John S. Marmaduke during his raid into Missouri.



Gen. Joseph Orville “J.O.” Shelby was an “unreconstructed Rebel” who preferred to leave the United States after the South lost its war for independence. He and his men were remembered as “the Undefeated,” spurring someone to write an additional passage to the South’s unofficial postwar national anthem: “I won’t be reconstructed, I’m better now than then. And for a Carpetbagger I do not give a damn. So it’s forward to the frontier, soon as I can go. I’ll fix me up a weapon and start for Mexico.”

The raid culminated on April 26, 1863 at Cape Girardeau, Missouri. Cape Girardeau has occupied early in the war by Union forces and was heavily fortified. Cape Girardeau was not the original intended target by generals Marmaduke and Shelby.

Shelby had been informed that Gen. McNeil was in Pemiscot County conscripting anyone and everyone he could. Orders for McNeil had been captured ordering McNeil back to Pilot Knob because its commander had feared an attack. Knowing this, Shelby ordered

one of his subordinate officers (Col. Carter) to get behind McNeil and drive him to Pilot Knob. Shelby issued specific orders that if McNeil did not go back to Pilot Knob, Col. Carter was not to pursue him (if he fled to Cape Girardeau or New Madrid).⁵

Perhaps Col. Carter would have been more likely to obey Shelby's order if McNeil had not been known for executing 10 Confederate prisoners at Palmyra as a reprisal for the disappearance of a Union informant. The execution of McNeil was falsely thought to have been done by Col. Porter of the Confederate army. It was later learned that Porter did not murder McNeil. But news of the event spread not only through Missouri but the entire South. McNeil was not only hated but was a target by Southerners looking to avenge the Palmyra Massacre.⁶

It is also worth noting that McNeil was not the only murderer on Marmaduke's list upon entering Missouri. John Newman Edwards wrote in *Shelby and His Men; or the War in the West* that:

At Patterson, a small outpost very far down in the southeast [Missouri], there had been stationed for some time a Missouri federal militia unit under Col. Smart, and also several independent Home Guard companies the most bloody and murderous of which was commanded by a certain Capt. William T. Leper [Leeper]. . . . Gen. Marmaduke made excellent dispositions to surround the town and capture its garrison, for Leper, as everyone knew, was a goodly prize, and the rope had been duly prepared for the stretching.⁷

Both McNeil and Leper could consider themselves very fortunate that the Confederates were unsuccessful in capturing either of them, for they certainly would have been taken out and executed.

Several months later, on July 4, 1863, Gen. Shelby was wounded in an attack on a Union artillery position at Helena, Arkansas.

After the fall of Little Rock, Arkansas, on Sept. 10, 1863, Confederate Gen. Sterling Price led his troops back to the northwest Arkansas town of Arkadelphia, according to an article published in the Sept. 27, 2013 issue of *The New York Times* entitled, "Shelby's Great Raid":

Sitting outside Arkadelphia, Shelby had pondered the future under his commanders—and decided there wasn't one. With his adjutant and historian John N. Edwards at his side, Shelby met with Thomas C. Reynolds, the Confederate governor-in-exile of Missouri, and sought support for a new raid, one that he alone would lead. The objectives, Edwards wrote later,

were "to penetrate Missouri as far as practicable, inflict what damage he could upon the enemy, and gather unto his friends the greatest advantage possible.

Where had Shelby dreamed up this quixotic venture? Was it from hearing of exploits of his boyhood friend John Hunt Morgan, whose two-week invasion of Indiana and Ohio in July had terrorized Northerners? Or was it the memory of his own 800-mile expedition behind Union lines to his home in Lafayette County, Mo., in the summer of 1862, from which he returned with 1,000 fresh recruits—the core of his Iron Brigade?

Whatever the inspiration for the raid, it lacked support from Shelby's military superiors. But Reynolds was excited. As good Missouri Confederates, he and Shelby shared a belief that under the right circumstances, the arrival of the Stars and Bars could foment an insurrection in the slave-owning Union border state. Indeed, pro-Southern feeling in Missouri was high, thanks to extremely oppressive measures taken by federal troops in four counties in the western part of the state.

Reynolds prevailed on Price and the new commander of Confederate forces in Arkansas, Theophilus H. Holmes, to give Shelby the go-ahead. Holmes, a mostly deaf, 59-year-old mediocre leader known behind his back as "Granny Holmes," may have assented to the raid to rid himself of an impetuous colonel who he assumed would be captured, as Morgan had been earlier. Like many professional military

men, Holmes saw little difference between a raider and a bushwhacker.

On the eve of the raid, the general called Shelby to his tent. As soon as he entered, wrote Edwards, Holmes said, "Sir, your men are nothing but a set of thieves, and their thieving must be stopped."

Shelby demanded to know the general's source. "Everybody says so," replied Holmes.

"Do you believe a thing when everybody says it?" replied Shelby.

Holmes replied that he did.

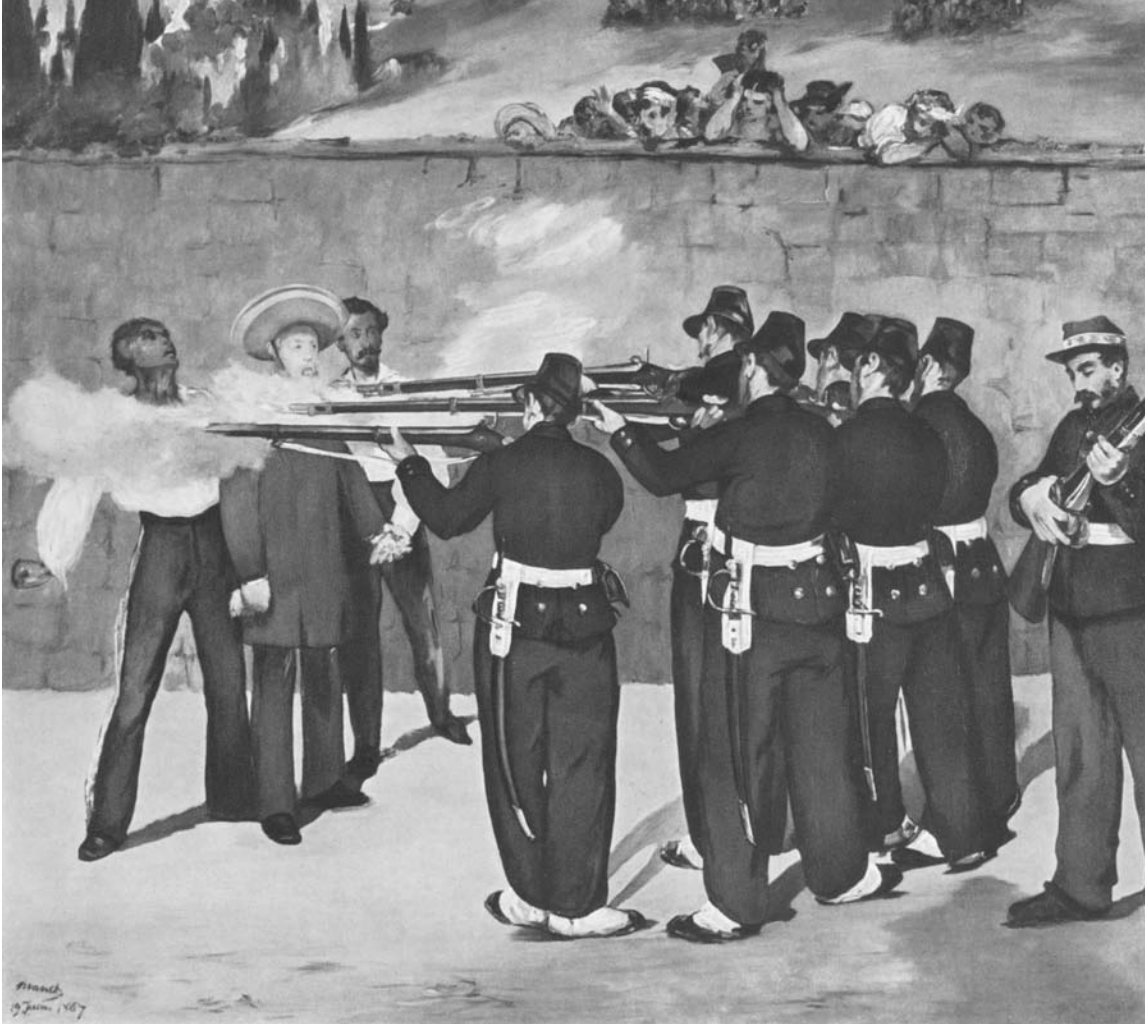
"Do you know what everybody says about you?" Shelby retorted.

Holmes said that he did not.

"They say that you are a damned old fool," Shelby shouted.

And with that, on Sept. 22, 1863, Shelby and 800 men in four divisions rode out of Arkadelphia, to the cheers of soldiers and citizens. As they parted, Price told his colonel that if he returned safely from Missouri, a pro-

"Most military historians consider Shelby like Nathan Bedford Forrest, an untutored genius of leadership, organization, tactics."



Maximilian Executed

At the end of the Civil War, Gen. Joe Shelby and about 1,000 of his men trekked to Mexico and offered their talents as soldiers to Emperor Maximilian, a younger brother of Austria's Emperor Franz Joseph I. Though Maximilian refused to use the Confederates as a foreign legion, he did grant them tracts of land near Veracruz on which to settle. Unfortunately, Maximilian's reign was short lived. He was overthrown by anti-monarchist forces supportive of Benito Juarez. Shortly thereafter, the grant of land was revoked and Shelby and many of his men returned to the United States. (Left, Edouard Manet's painting of the June 19, 1867 execution of Maximilian and his two top generals, Miguel Miramon and Tomas Mejia.)

motion to brigadier general would be awaiting him.”⁸

Gen. Holmes was surprised, to say the least, when Shelby returned after his 1,500-mile raid into Missouri with more men and better equipment than he had left with. According to the previously cited *New York Times* article:

In his official report, the colonel—soon to be “General” Shelby—claimed to have caused \$2 million in damage and killed or wounded 600 [Union] soldiers, while losing just 150 of his own. He also reported that Missourians remained “true to the South and her institutions, yet needing the strong presence of a Confederate army to make them volunteer.”⁹

During Gen. Price's expedition into Missouri in 1864, Shelby advised Price not to attack Fort Davidson in Pilot Knob:

Tuesday, September 25. Price conferred with his division commanders as to the expedition's future course of action. He had received word that St. Louis was heavily defended and of [Gen. Thomas] Ewing's presence at Pilot Knob. Shelby, the junior division commander, wanted to push immediately to St. Louis. His scouts had reconnoitered Pilot Knob, and he did not believe it would justify the cost of an assault. Marmaduke and Fagan, however, urged that Ewing be dis-

posed of before advancing on St. Louis. Price decided on the latter course, ostensibly because he did not want to leave a garrison in his rear; but in all likelihood he concluded that it would be impossible to take St. Louis. An easy victory over Ewing, Price reasoned, would lift his troops' morale and lift the spirits of Confederate sympathizers in the state.¹⁰

On the advice of his chief engineer, Capt. T.J. Mackey, Price planned to shell the fort. But shortly after opening the bombardment from atop Shepherd's Mountain some local citizens asked him not to shell it, claiming it would endanger the lives of Southern adherents held prisoner inside. This information, which Price apparently did not confirm, undoubtedly led him to agree with Fagan and Marmaduke, who had advocated a direct assault. Price ordered the two division commanders to prepare for an attack. Marmaduke deployed his division on the north slope of Shepherd's Mountain and Fagan took a position to his right. Cabell's Brigade occupied the gap between the two mountains, with McCray's and Slemmons's brigades at the base of Pilot Knob. Dobbin's Brigade was positioned north of the fort to block Potosi Road, the fort's only practical escape route. Drawing on his past experiences, Price personally emphasized to Mar-

maduke's and Fagan's officers the need for coordination, stressing that both divisions must assault simultaneously and in line. Before ordering the attack, Price called on Ewing twice to surrender. Ewing refused, believing he could hold out. He also had strong personal reasons for not wanting to be captured. While commanding the District of the Border in 1863, he had issued the infamous Order No. 11 from his headquarters in Kansas City. This order, issued in the wake of William Quantrill's raid on Lawrence, Kansas, required the mass eviction of citizens from four border counties in western Missouri, which caused great suffering among the populace. Many of those affected were now serving in or had relatives in Price's army. Ewing knew that if he were captured he would likely be killed. [See our story in this issue beginning on page 20.—Ed.]

His fears were certainly justified. Earlier that day the Confederates had captured Maj. James Wilson—the stalwart defender of the Shut-in-Gap—whom they held responsible for outrages against Southerners in the Pilot Knob vicinity, including the infamous Wilson Massacre.¹¹ [See TBR January/February 2007.—Ed.]

Price, having failed to listen to the advice of Gen. Shelby to bypass Fort Davidson, and his having failed to listen to his chief engineer (to bomb the fort with cannon), ordered several assaults on the fort, resulting in the loss of over 1,200 badly needed men who were now casualties of the assaults.

Gen. Ewing escaped with his command in the middle of the night and blew up the ammunition magazine.

Gen. Price then turned his focus on capturing Jefferson City and restoring Gov. Reynolds to the state capitol, but upon arriving found it too heavily defended. Price did find badly needed supplies in Boonville and received over 2,000 recruits at that place at which time he pushed his army deeper into western Missouri.

The authors of the website "Civil War on the Western Border" summarize the subsequent events as such:

On Oct. 22, after three hard hours of fighting at Byram's Ford, the main crossing of the Big Blue, Price's flanking movement upstream pushed across the river and fell upon Curtis's exposed right. As the federals withdrew, Shelby's division crossed the Big Blue River and drove toward Westport, south of which Curtis reformed his line during the night.

In Price's rear, Pleasonton crossed the Little Blue River, drove Marmaduke's division through Independence and pushed it nearly to the Big Blue. With his army in danger of being trapped by converging columns and its large wagon train captured as it crossed the steep ford, Price decided to attack the federals near Westport in hopes of moving southward.

At daybreak on Oct. 23, Shelby's division attacked

the federal position. During several hours of fighting, opposing lines of horsemen charged and counter-charged in the grassy hills along Brush Creek while Pleasonton assaulted Marmaduke, who defended Byram's Ford. Both sides took heavy losses. At noon, Marmaduke's troops, out of ammunition, routed across the prairie with federal horsemen in pursuit. Hundreds of Marmaduke's men were captured in the retreat. Simultaneously, Curtis and Blunt attacked Shelby's right flank, nearly breaking the Confederate line, and federals pushed through the last defended ford at Hickman's Mill.

Pressed on three sides, Price ordered a retreat southward, leaving Shelby to fight a rear guard. As Marmaduke and Fagan streamed toward Little Santa Fe, only Shelby's dogged defense saved Price's army from complete destruction. The Battle of Westport proved to be Price's spectacular downfall, as the largest and the last major action which took place in the trans-Mississippi region. Exact casualties are unavailable, but estimates are nearly 1,500 dead and wounded on each side.¹²

As Price fled southward along Military Road, the ponderous wagon train allowed federal pursuers to overtake the fleeing Confederates in Kansas, at Trading Post, Mine Creek and Marmiton River, 60 miles south. After the three encounters, during which Marmaduke was captured at Mine Creek, Price burned nearly a third of his wagons. Skirmishing continued, and Blunt caught up with Price's retreating column at Newtonia, Missouri, on Oct. 28. Shelby again managed to drive off the advancing federals.

The next day, Union Gen. William Rosecrans recalled all troops in his Department of Missouri, leaving Col. Curtis with just 3,500 cavalry continuing the chase. Price soon dispersed his forces and marched through Indian Territory (present-day Oklahoma) to Texas.

When the column returned to Laynesport, Arkansas, on Dec. 2, Price's army had traveled 1,488 miles. Missouri remained under Union control, Lincoln was reelected, and the Confederate cause on the western border had been dealt a serious blow.¹³

When the war ended, rather than surrender, Gen. Shelby led his men to Mexico. While traveling through Texas, Shelby and his men found the state in disarray with law and order rapidly on the decline. While passing through Austin, they found themselves entering an environment of near anarchy. It is during this time that Shelby saved the postwar Lone Star state by securing its treasury against looters.

After the disaster at Westport, Missouri, in October 1864, Shelby's men had begun their trek south, wintering near Dallas, Texas. They operated in northern Texas through the spring of 1865, and then were joined

by a number of Confederate notables who had gone west instead of surrendering. The Missourians gathered in camp at Chatfield, north of Corsicana, Texas, where Shelby announced he would go to Mexico. A number of his troopers, estimated at between 450 and 1,000, chose to follow.

The first remarkable event on the Missourians' road south occurred in Austin. They arrived just as a mob had entered the Texas State House and looted the last sizable treasure of the Confederate government. The Missourians attacked and routed the mob. The question of "ownership" of \$300,000 in gold and silver was then decided by Shelby, who exhorted his men: "We are the last of our race. Let us be the best as well." The treasure was left in the hands of the state of Texas, to become the foundation of Texas's postwar economy.

According to the website "Missouri Civil War": "In June 1865, Shelby's Missouri Cavalry Division was the last Confederate military unit remaining in service in the former Confederacy. It never surrendered to federal authorities. Instead, it embarked on one of history's most remarkable odysseys."¹⁴

According to the Texas State Historical Association:

On June 1, 1865, with his army disintegrating around him, he determined to take as many of his men as would go to Mexico to continue the war. With a few hundred well-disciplined and orderly men, with all their cannons, arms, and ammunition, he marched from Corsicana through Waco, Austin, and San Antonio to Eagle Pass. Prominent persons joined them on the way. While crossing the Rio Grande at Piedras Negras, they sank their Confederate guidon in the river, in what came to be known as the "Grave of the Confederacy Incident."

In Mexico they encountered the rebel forces of Benito Juárez. After selling all their arms to the rebels except their revolvers and carbines, they were permitted to pass to the south. They arrived in Mexico City in mid-August 1865. There they offered their services to Maximilian. Although grateful, the French-installed emperor received them only as immigrant settlers subject to the liberal terms of the decree of Sept. 5, 1865. Many of Shelby's men accepted and joined in the establishment of the Carlota colony in Córdoba and a colony at Tuxpan. Others joined the army or went to the Pacific coast and sailed to South America or California. Shelby himself occupied the hacienda of Santa Anna and began business as a freight contractor.¹⁵

Under the rule of Maximilian, Shelby and his former Confederates prospered, but this quickly ended after the emperor was deposed, and Shelby returned to Missouri in 1867.

"Penniless, Shelby came back to Lafayette County,

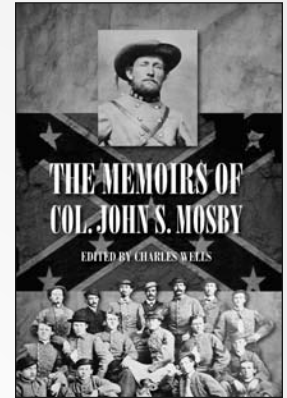
The Memoirs of Col. John S. Mosby

These are the uncensored memoirs of John Singleton Mosby, the legendary Confederate cavalry leader who bedeviled the Union army for four years, almost within sight of the U.S. capital. With only a few thousand local men under his command, Mosby's ability to strike fast and then melt away before an effective pursuit could be organized kept the Yankee forces awake and often snarled in knots. His ability to disappear into the dark night or the deep woods earned him the nickname "The Gray Ghost." With daring feats like capturing a Yankee general out of his bed within his own defended headquarters, Mosby made his name a synonym for guerrilla warfare. Even today you can purchase in Virginia a map showing "Mosby's Confederacy." Here Mosby supporters sheltered and fed him and his troops despite the danger to themselves.

The character of the man may be judged by the enemies he kept. Said General Joseph Hooker, "I may here state that while at Fairfax Court House my cavalry was reinforced by that of Major-General Stahel. The latter numbered 6,100 sabers. . . . The force opposed to them was Mosby's guerrillas, numbering about 200, and, if the reports of the newspapers were to be believed, this whole party was killed two or three times during the winter. From the time I took command of the army of the Potomac, there was no evidence that any force of the enemy, other than the above-named, was within 100 miles of Washington City; and yet the planks on the chain bridge were taken up at night" for fear of Mosby.

Mosby outraged many of his Southern admirers after the war when he publicly endorsed General U.S. Grant for President. After an appointment as U.S. Consul to Hong Kong and a 16-year career with the Southern Pacific Railroad, he came to Washington as an assistant attorney in the Department of Justice. Loyal to the end to his commander, J.E.B. Stuart, Mosby also answered accusations that Stuart's mistakes cost Lee the battle of Gettysburg.

From his recollections of Grant and Lee to his blow-by-blow accounts of the battles at Manassas, Fairfax Court House, Gettysburg and more, here is Mosby's brutally honest account in his own words of the most devastating war in American history. Edited by Charles Wells. Softcover, 262 pages, #659, \$25 minus 10% for TBR subscribers. Add \$5 S&H in the U.S. Add \$24 S&H outside U.S. Order from TBR BOOK CLUB, P.O. Box 15877, Washington, D.C. 20003. Call 1-877-773-9077 toll free to charge.





The Battle of Wilson's Creek was the first major battle fought west of the Mississippi River. It resulted in a victory for the Missouri and Arkansas state guards. But soon thereafter, the Rebels were defeated at the Battle of Pea Ridge, and Confederate hopes of occupying Missouri were ended and the state became a bloody battleground, pitting Confederate guerrillas against Union troops. The mural above by N.C. Wyeth depicts the battle, and currently graces the Missouri State Capitol.

and with financial aid from kinsmen took up a farmstead near Aullville. His farming prospered, and he was sufficiently well off by 1885 to move to a farm more to his liking in Bates County.¹⁶

In 1883 Shelby testified on behalf of his old friend and former comrade in arms Frank James—the brother of famed outlaw and Civil War guerrilla Jesse James—who had turned himself in to stand trial the previous year:

Gen. Joseph O. Shelby, who had known him during his days as a Civil War guerilla, encouraged the jurors to see Frank James as a defender of the South against corrupt big businesses from the North. When asked to identify Frank in the courtroom, the distinguished general exclaimed: “Where is my old friend and comrade in arms? Ah, there I see him! Allow me, I wish to shake hands with my fellow soldier who fought by my side for Southern rights!”¹⁷

Unable to find a Missouri jury willing to convict him, Frank was found not guilty at this trial and two more. He became a free man in 1888 and lived another 32 years, allegedly never firing another shot except when discharging pistols at the start of several county horse races.

In 1893 President Grover Cleveland appointed Shelby U.S. marshal for Missouri’s Western District. Never one to shy away from controversy, Shelby was instrumental in ending the Pulliam (railroad workers) strike the following year. “When Gov. William Joel Stone chastised Shelby for exerting federal muscle in Missouri’s affairs, Shelby retorted that Stone’s prob-

lem had been settled at Appomattox.”¹⁸

J.O. Shelby—“border ruffian,” Confederate general, Mexican colonist and U.S. marshal—died quietly at his home on Feb. 13, 1897 and was buried in Kansas City, Missouri, the state that he so bravely defended. ♦

ENDNOTES:

- 1 *Recollections, 1844-1909*, Franklin Hudson Publishing Company, 1911, Kansas City, Mo., pp. 205-206.
- 2 <http://mocivilwar150.com/history/figure/191>.
- 3 *Notable Southern Families*, Lookout Publishing Company, 1922, p. 324.
- 4 <http://shs.unsystem.edu/historicmissourians/name/s/shelby/>.
- 5 *Op cit.*, pp. 154-155.
- 6 *History of Northeast Missouri*, Vol. I, Walter Williams, pgs-63-64.
- 7 *Shelby and His Men; or the War in the West*, p. 152.
- 8 “Shelby’s Great Raid,” *New York Times*, Sept. 20, 2013, Barnhart, Eikhoff.
- 9 *Ibid.*
- 10 “Missouri! One Last Time,” *Blue and Gray* magazine, Sallee, June 1991.
- 11 *Ibid.*
- 12 <http://www.civilwaronthewesternborder.org>.
- 13 http://usacac.army.mil/sites/default/files/documents/4de/CSI/CSI_SalleesRide.pdf
- 14 www.mocivilwar.org/long-ride/.
- 15 <https://tshaonline.org/handbook/online/articles/qms01>.
- 16 <http://mocivilwar150.com/history/figure/191>.
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CLINT LACY is a life-long Missouri resident and was born and raised in southeast Missouri, originally in the lowlands of Stoddard County. He has resided in the Ozark Foothills of Bollinger County for the past 15 years. Lacy's work has appeared previously in THE BARNES REVIEW history magazine and numerous independently owned newspapers and websites. (See TBR January/February 2007 and May/June 2008. He is a member of the Sons of Confederate Veterans.