

ENTERED

1 MAR 26 1990

2 IN REGISTER BY TO

MTC 31632 MK

IN THE CIRCUIT COURT OF THE STATE OF OREGON

FOR THE COUNTY OF MULTNOMAH

RECEIVED  
DEPARTMENT OF FREIGHT  
1990 MAR 23 AM 8:55

## Probate Department

4 In the Matter of the Estate )

5 of )

6 JEAN H. BLOCH, )

7 Deceased. )

No. 8811-92140

DECREE OF DISTRIBUTION

8 The personal representatives having filed their Final Account  
9 and Petition for Decree of Final Distribution, and it appearing  
10 that the only other devisee has filed waiver of notice and  
11 consent, the court finds that:

12 (1) All Oregon income taxes have been paid and an  
13 appropriate release has been filed herein;

14 (2) The only remaining expense of administration is  
15 attorneys' fees of \$4,500.00;

16 (3) The remainder of the estate assets after payment of the  
17 expense set forth above is vested in the following devisees in  
18 accordance with the terms of decedent's will:

19 Daniel J. Bloch ✓

one-quarter of personal effects,  
household effects and residue

20 Steven J. Bloch ✓

one-quarter of personal effects,  
household effects and residue

21 Carol Ann Thom ✓

one-quarter of personal effects,  
household effects and residue

22 Daniel J. Bloch and  
23 Steven J. Bloch,  
24 Trustees for Meleea  
25 K. Myluv

\$10,000 plus one-quarter of personal  
effects, household effects and  
26 residue ✓

Page 1 - DECREE OF DISTRIBUTION

Return: MTC  
Attn: Jean

SCHWASE, WILLIAMSON & WYATT  
Attorneys at Law  
Suites 1600-1800, Postwest Center  
1211 S. W. Fifth Avenue  
Portland, Oregon 97204-3775


1 IT IS ORDERED AND DECREED:

2 (1) The Final Account is hereby approved;

3 (2) The personal representatives are allowed the sum of  
4 \$4,500.00 as attorneys' fees.

5 (3) The personal representatives are directed to make  
6 distribution of the remaining estate property to the persons set  
7 forth above and said property is hereby vested in said persons.

8 DATED this 23 day of March, 1990.

9   
10 \_\_\_\_\_  
11 JUDGE

12 Daniel J. Bloch  
13 No. 59 Oswego Summit  
14 Lake Oswego, OR 97035

15 Steven J. Bloch  
16 5799 SW Salmon  
17 Portland, OR 97221

18 Co-Personal Representatives

19 William D. Peek  
20 Schwabe, Williamson & Wyatt  
21 1211 SW 5th, Suites 1600-1950  
22 Portland, OR 97204

23 Of Attorneys for Personal Representatives  
24  
25  
26

MAY 15 1989  
CIRCUIT COURT  
MULTNOMAH COUNTY, OREGON

RECEIVED  
DEPARTMENT OF PROBATE

IN THE CIRCUIT COURT OF THE STATE OF OREGON  
JAN 15 1989

FOR THE COUNTY OF MULTNOMAH

Department of Probate

2 In the Matter of the Estate )  
3 of ) No. 8811-92140  
4 )  
5 )  
6 JEAN H. BLOCH, Deceased. ) INVENTORY

7 I hereby certify that attached is a complete inventory  
8 of all the property of the estate that has come into my possession  
9 or knowledge, with my estimate of the true cash value of the  
10 property as of the date of death of the decedent.

11 DATED this 8th day of May, 1989.

12  
13 Daniel J. Bloch  
14 DANIEL J. BLOCH

15  
16 STEVEN J. BLOCH

17  
18 Personal Representatives  
19  
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26



CASH:

- Checking account 323070403-3016-799-5-0840, Far West Federal Bank	\$ 2,402.36
- Savings account 3744-947, Far West Federal Bank	3,634.81

SECURITIES:

- \$10,000 Oregon Veterans bonds, 9% due 4/1/01	11,100.00
- \$20,000 Portland Hydro bonds, 7% due 10/1/16	18,800.00
- 2928.321 shares, Murphy Favre Composite Income Fund, account 001-08130	25,974.21
- 125 shares, N.W. Natural Gas, common	2,593.75
- 100 shares, N.W. Natural Gas, preferred	3,400.00
- 314 shares, PacifiCorp, common	10,960.56
- 100 shares, Sprouse Reitz, common	2,325.00
- 34 shares, U.S. West, common	1,990.06

REAL PROPERTY:

- Lot 16, Blk 3, ROUND LAKE ESTATES, Klamath County, Oregon	5,500.00
- Lot 23, Blk 3, ROUND LAKE ESTATES, Klamath County, Oregon	6,000.00
- Lot 34, Blk 3, ROUND LAKE ESTATES, Klamath County, Oregon	5,000.00
- Lot 30, Blk 3, ROUND LAKE ESTATES, Klamath County, Oregon, undivided one half interest	2,500.00

MISCELLANEOUS:

- .0373 interest in County Terrace Investors, Ltd, a limited partnership	5,960.00
- 1976 Chrysler Cordova automobile	<u>1,675.00</u>

TOTAL

\$109,815.75

109  
14  
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FILE  
NOV 16 1988RECEIVED  
DEPARTMENT OF PROBATE

IN THE CIRCUIT COURT OF THE STATE OF OREGON

1988 NOV 16 AM 10:21

FOR THE COUNTY OF MULTNOMAH

Probate Department

4 In the Matter of the Estate )

No. 8811-92140

5 of )

6 JEAN H. BLOCH,

Deceased. )

ORDER ADMITTING WILL TO  
PROBATE AND APPOINTING  
PERSONAL REPRESENTATIVES

7

8 Upon the petition of Daniel J. Bloch and Steven J. Bloch for probate of the will of the above-named decedent,

10 court finds the allegations of that petition to be true.

11 IT IS THEREFORE ORDERED:

12

1

13 The will dated April 30, 1982 is the last will of decedent  
14 above named and the will is hereby admitted to probate.

15

2

16 Daniel J. Bloch and Steven J. Bloch are appointed personal  
17 representatives of the estate.

18

3

19 The personal representatives are not required to file a bond,  
20 and letters shall be issued forthwith in the manner provided by law.

21

DATED: November 16<sup>th</sup>, 1988.

22

JUDGE

23

24 Daniel J. Bloch  
25 No. 59 Oswego Summit  
Lake Oswego, Oregon 97035  
26 Telephone: (503) 224-2311Page 1 - ORDER ADMITTING WILL TO PROBATE AND APPOINTING  
PERSONAL REPRESENTATIVESSCHWABE, WILLIAMSON & WYATT  
Attorneys at Law  
Suites 1600-1800, Pacwest Center  
1211 S. W. Fifth Avenue  
Portland, Oregon 97204-3795  
Telephone: (503) 222-9231

1 Steven J. Bloch  
5799 S.W. Salmon  
2 Portland, OR 97221  
Telephone: (503) 224-2311

3

**Personal Representatives**

4

William D. Peek, OSB #64086  
5 Schwabe, Williamson & Wyatt  
Suites 1600-1900 Pacwest Center  
6 1211 S.W. Fifth Avenue  
Portland, OR 97204  
7 Telephone: (503) 222-9981

8

**Attorneys for Personal Representative**

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Page 2 - ORDER ADMITTING WILL TO PROBATE AND APPOINTING  
PERSONAL REPRESENTATIVES

SCHWABE, WILLIAMSON & WYATT  
Attorneys at Law  
Suites 1600-1900, Pacwest Center  
1211 S. W. Fifth Avenue  
Portland, Oregon 97204-3795



FILED

## LAST WILL AND TESTAMENT

OF

JEAN H. BLOCH

8811-92140

NOV 16 1988

CHIEF

CLERK OF DISTRICT COURT

I  
DECLARATION

1.1 I, JEAN H. BLOCH, a resident of the State of Oregon, hereby revoke all my former Wills and Codicils, and declare this my Last Will and Testament.

II  
FAMILY

2.1 I declare that I am divorced and that my presently living children are:

MELEEA K. MYLUV, born May 14, 1945;  
CAROL ANN THOM, born August 27, 1949;  
DANIEL J. BLOCH, born September 7, 1953; and  
STEVEN J. BLOCH, born September 29, 1954

2.2 The terms "child", "children", or "issue" include adopted children.

III  
ESTATE ADMINISTRATION

3.1 I appoint DANIEL J. BLOCH and STEVEN J. BLOCH as my co-Personal Representative for this my Last Will and Testament. If one of them should predecease me or for any cause be unable or unwilling to serve, I appoint the other to serve above. I direct that no Personal Representative appointed in accordance with these provisions shall be required to furnish any bond or other security.

3.2 My Personal Representative may exercise at their discretion any rights or elections with respect to any taxes which may from time to time be available to my estate. These rights or elections include, but are not limited to:

(A) The power to make decisions with respect to claiming expenses or other items as deductions for estate tax or for income tax purposes; (B) The power to select the taxable year for income tax purposes; (C) The power to select the alternate valuation date for estate tax purposes; and (D) The power to pay any tax payable or collect any refund receivable in respect of such return or returns. My Personal

JHB

1988 NOV 16 AM 9 55

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Representative shall be under no obligation to make any adjustments between the various beneficiaries of my estate because of the treatment of any tax election.

## IV

4.1 I direct that my debts and funeral expenses be promptly paid according to their terms. I direct my Personal Representatives to pay all death or succession taxes payable by reason of my death except for those taxes imposed for generation skipping transfers in which I am the deemed transferor. All taxes shall be paid, without apportionment, from my residuary estate. If any other person shall pay any such tax, my Personal Representatives shall reimburse such person.

## V

## DIVISION OF ASSETS

5.1 I devise my personal and household effects to my surviving children in equal shares, to be divided as they shall agree. If they fail to agree within six months following my death, my Personal Representative shall make the division of such property among my surviving children.

5.2 I devise the sum of \$10,000 in cash to DANIEL J. BLOCH and STEVEN J. BLOCH as co-trustees for MELEEA K. MYLUV to be held in and administered as a part of the trust described in paragraph 5.3.

5.3 I devise the residue of my estate as follows: One-fourth to my daughter, CAROL ANN THOM; one-fourth to my son, DANIEL J. BLOCH; one-fourth to my son, STEVEN J. BLOCH; one-fourth to DANIEL J. BLOCH and STEVEN J. BLOCH as co-trustees to be administered as follows:

(A) During the lifetime of MELEEA K. MYLUV my trustees shall pay to her quarterly or at more frequent intervals the net income from the trust.

(B) My trustees may in their discretion distribute from time to time to MELEEA K. MYLUV such sums from principal of this trust as my Trustees deem necessary to assist said beneficiary in maintaining an adequate standard of living or to assist her in any financial emergency as may result from accident or illness. In making any such principal distribution my Trustees shall consider the beneficiary's other sources of income.

(C) Upon the death of MELEEA K. MYLUV my Trustees



shall distribute the trust estate equally among her children, or their issue per stirpes if such child dies before the distribution of the trust; provided, however, that if any such child shall not have attained age 21, his or her share shall be retained in trust until the child attains such age. Until final distribution of a share is made, the Trustees shall pay for the beneficiary for whom it is held such amounts of his or her share necessary for the maintenance, welfare, and education of the beneficiary. If MELEEA K. MYLUV dies without surviving issue the trust estate shall be divided equally between my surviving children or their issue per stirpes if such child dies before distribution of the trust.

(D) Anything to the contrary notwithstanding, this trust shall terminate and be distributed as if it had then terminated in accordance with its terms, not later in any event than 21 years after the death of the last survivor of the JEAN H. BLOCH, MELEEA K. MYLUV, and the latter's children and grandchildren living at the time of Grantor's death.

(E) If there should remain in the hands of my Personal Representative any part of my estate for which there is no named or described beneficiary, such part shall be distributed to those persons then living who would be entitled to receive my property under the laws of the State of Oregon then in effect governing the distribution of property of intestate persons.

## VI DIRECTIONS TO TRUSTEE

6.1 With regard to any trust created by this Will, the Trustee in addition to powers conferred by law, shall have the power:

(A) To invest and reinvest the trust estate in notes, mortgages, preferred and common stock or any other securities, savings accounts and certificates, and other property, real or personal including any common trust fund administered by a Corporate Trustee;

(B) To purchase from my estate, whether or not the Trustee would otherwise make such an investment, any of the assets thereof at the value shown by the Inventory in order to enable the Personal Representative to convert such property into cash;

(C) To manage, sell, convey, exchange, encumber, divide, subdivide, improve and maintain the trust estate or any part; to create restrictions, easements and other servitudes;

to carry insurance in such amount and against such hazards as the Trustee may deem advisable; to lease, license and create such other rights, privileges and interests as the Trustee may deem advisable for terms within or extending beyond the duration of the trust;

(D) To pay assessments and other sums deemed necessary by the Trustee for the protection of the trust estate; to participate in voting trusts, pooling agreements, foreclosures, reorganizations, consolidations, mergers, and liquidations, and in connection therewith to deposit securities with and transfer title to any protective or other committee or fiduciary; to give proxies, general and special, to exercise or sell stock subscription or conversion rights; to accept and retain as an investment any securities or other property, whether or not income producing or authorized by law for the investment of trust funds, received through the exercise of any of the foregoing powers;

(E) To realize, by suit or otherwise, upon any trust insurance policy, any promissory note or other chose in action of the trust estate, and in its settlement to compromise, discount, adjust, extend or abandon it;

(F) To make, execute and deliver such instruments as it may deem proper in connection with the exercise of the rights, options and privileges conferred upon it by the terms of the insurance policies;

(G) To advance funds for the benefit of the trust estate, or for the payment of any distributive share or interest, any such advance with interest at current rates to be a first lien upon the trust estate; to borrow money for any purpose the Trustee shall deem to be for the interest of the trust estate upon such terms and conditions as the Trustee may deem proper;

(H) To pay all taxes, charges, commissions and other expenses of the trust estate. Any Trustee shall be entitled to reasonable compensation for his services. The Trustees shall be reimbursed for all outlays and advances and all costs and expenses incurred for the preservation, maintenance and protection of the trust estate;

(I) To hold securities and other property in the name of the Trustee or in the name of its nominee but the Trustee shall be responsible for the acts of such nominee affecting such property;

(J) To employ attorneys, accountants, or agents that

have discretionary powers;

(K) To enter into private annuity contracts with persons including beneficiaries under this Trust;

(L) To distribute the trust estate according to the terms of this instrument in money or property in kind. The Trustee's judgment with respect to market value and any division of property in kind shall be conclusively binding on all parties to this instrument regardless of the adjusted basis of each property;

(M) To allocate all receipts and expenses between income and principal in accord with the Uniform Principal and Income Act as then in effect; provided, however, if the Act is not then effective the Trustee in its sole discretion shall make such allocations as it deems proper;

(N) To comply with the terms of any stock purchase or stock redemption agreement with any closely held corporation or its shareholders covering stock owned by the Trustee;

(O) To retain, continue and operate any business received for such period as Trustee may deem expedient;

(P) To transfer the situs of any trust estate to such other place, within or outside of the United States, as in their opinion shall be for the best interests of the trust estate and of the several beneficiaries hereunder. If there is a Corporate Trustee acting hereunder at the time of the transfer of the situs of the trust estate and if said Corporate Trustee is unable to continue to serve as Trustee in the jurisdiction to which the situs of the trust is transferred, then said Corporate Trustee shall resign as Trustee and the remaining Trustees shall appoint a new Corporate Trustee which is qualified to serve as Trustee in said jurisdiction;

(Q) To enter into mergers, recapitalizations, corporate divisions, liquidations or other forms of corporate reorganizations; to participate in corporate or partnership formations or joint ventures with respect to trust property; to amend any agreement relating thereto; or to distribute or liquidate therefrom; and

(R) To do all acts, except as otherwise specified in its judgment needful or desirable for the proper and advantageous management of the trust estate, to the same extent and with the same effect as might legally be done by an



individual in absolute ownership and control of the said property.

6.2 The Trustee shall not be required to sell or otherwise dispose of any investment solely because the retention thereof may prevent adequate diversification of investment or may result in a higher concentration of the value of the trust estate in such investment than the Trustee would ordinarily permit.

6.3 Any successor Trustee shall have all the title, power and discretion of the Trustee originally named. No successor Trustee shall be personally liable for any act or omission of any predecessor Trustee. Any successor Trustee, with the written approval of the person or persons appointing the successor Trustee, may accept without examination or review the accounts rendered and the property delivered from a predecessor Trustee without incurring any liability.

6.4 No Trustee shall be required to give any bond or security as a Trustee. A Trustee shall be liable only for his own willful breach of trust. A Trustee may limit his personal liability on contracts executed as Trustee.

## VII DUTIES OF TRUSTEE

7.1 The Trustee shall be the custodian of the securities, funds and records of the Trust and shall have authority to collect and receive in sole names as such Trustee all monies payable to the Trust and to give receipts and other proper acquittances therefor and to make by check or draft as such Trustee all payments to be made from the Trust. In addition the Trustee shall establish and maintain the necessary books and records for the Trust.

7.2 The Trustees shall prepare at least annually a statement of account. Each statement of account shall at least show the receipts, disbursements and distributions since the last accounting and list trust assets showing cost and current fair market value.

## VIII TRUSTEE

8.1 Upon the death, legal incompetency, or resignation of one of my Trustees, the other shall continue as sole Trustee.

8.2 Discretionary decisions concerning the administration,

management and distribution of the trust estate shall normally be upon the concurrence of the Trustees.

IX  
MISCELLANEOUS

9.1 Whenever necessary in this agreement and where the context so requires, the singular term and the related pronoun shall include the plural, and the masculine, feminine and neuter shall be freely interchangeable.

9.2 Upon the death of any beneficiary any accrued or undistributed income shall be held and accounted for, or distributed in the same manner as if it had been received and accrued after the beneficiary's death.

9.3 If any annuity or other payment payable to the Trustee herein is excluded from my gross estate under Section 2039 of the Internal Revenue Code of 1954 it shall not be used to pay any taxes, debts or other charges enforceable against my estate.

IN WITNESS WHEREOF, I hereunto set my hand and seal at Portland, Oregon, this 30 day of April, 1982.

Jean H. Bloch  
JEAN H. BLOCH  
Social Security No.: 540-22-2186

The foregoing instrument consisting of 7 pages, including this page, was on this 30<sup>th</sup> day of April, 1982, in our presence signed, published and declared to be her Last Will and Testament by JEAN H. BLOCH who was at that time of sound and disposing mind and memory and not acting under the fraud, duress or undue influence of any person whomsoever. In testimony whereof, we do at her request, in her presence, and in the presence of each other subscribe our names hereto as witnesses.

William D. Peck  
Witness

Fancy A. Batchelor  
Witness

1530 SW Taylor  
Portland, Oregon

1530 SW Taylor  
Portland, Oregon

PAGE 7 - LAST WILL AND TESTAMENT OF JHB

STATE OF OREGON: COUNTY OF KLAMATH: ss.  
Filed for record at request of Mountain Title Company the 25th day  
of January A.D., 19 94 at 9:23 o'clock A M., and duly recorded in Vol. M94,  
of Miscellaneous on Page 2397.  
Evelyn Biehn County Clerk  
By Russell Mueller

FEE \$70.00  
Non Stan 20.00