RECORDING REQUESTED BY

WHEN RECORDED MAIL TO

NAME
JENNIFER N. SAWDAY, ESQ.
MAILING
TREDWAY, LUMSDAINE, & DOYLE LLP.
3900 Kilroy Airport Way, Suite 240,
CITY, STATE ZIP CODE
Long Beach, CA 90806

2016-001620 Klamath County, Oregon



02/19/2016 11:01:24 AM

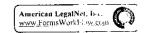
Fee: \$132.00

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TITLE(S)

AFFIDAVIT OF CLAIMING SUCCESSOR - TESTATE ESTATE

MAIL TAX STATEMENTS TO: Kerene Gross, Successor Trustee 317 S. Poinsettia Avenue Compton, CA 90221



FILED SIL OF ORECOM ATH CHACOLT COURT County of KLAMATH) STATE OF OFEGON 12 JUN 25 PM 4: 22 I hereby certify that the within is a true and correct copy and the whole CLERK OF COURT of the original Clerk of Cour 9 Date IN THE CIRCUIT COURT OF THE STATE OF OREGON 6 7 FOR THE COUNTY OF KLAMATH In re The Small Estate of: 8 1207285CV Case No. 9 Richard A. Endres AFFIDAVIT OF CLAIMING SUCCESSOR - TESTATE ESTATE 10 Deceased. STATE OF OREGON 11 SS. County of Klamath 13 14 I, Kerene Gross, being first duly sworn, say; I am the Trustee of the Trust concerning decedent, and "claiming successor" of the above-named decedent. Pertinent 17 Information is as follows: Name of decedent: 18 Richard A. Endres 19 Age at the time of death: 71 years 20 Resident Address: 6141 Capetown Street 21 Lakewood, CA 90713 22 Domicile for the last 10 years: Los Angeles County, 23 California 24 Social Security Number: 565-48-0889 This Affidavit is made pursuant to ORS 114.515. 25 26 / / / 27 28

LB/87154-1 26733-002

A description of decedent's property in Oregon, including its location and fair market value thereof, is:

Real Property

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Fair Market Value

The Northeast quarter of the

Southwest quarter of the

Southwest quarter of Section 8,

Township 36 South, Range 13 East,

Willamette Meridian.

\$11,800.00

Total Assets

- 3. Reasonable efforts have been made by the affiant to ascertain creditors of the Estate. All debts of the decedent have been paid.
- An Application or Petition for the appointment of a Personal Representative has not been granted in Oregon.
- 5. Decedent's heir and relationship to the decedent and his last known address is:

Name Relationship Last Known Address Philip R. Hall Brother 23115 S. Samuel St., Apartment Number 12 Torrance, CA 90505

A copy of this Affidavit showing the date of filing and a copy of the Last Will and Testament will be mailed to the 26 | heir at the last known address stated above.

/ / /

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- 6. The decedent died testate. An authenticated copy of the Last Will and Testament of the decedent is filed herewith. Pursuant to California law, the Original Will is filed with the Probate Court in California.
- 7. Decedent's devisee is the Trust of Richard A. Endres. Kerene Gross is the Trustee.
- 8. The interest in decedent's property described in this Affidavit to which the devisee Trust is entitled is:

Name

Interest

Trust of Richard A. Endres

100%

- 9. A copy of this Affidavit showing date of filing will be mailed to the Adult and Family Services Division, Estate Administration Section, Salem, Oregon.
- 10. Claims against the Estate not listed in this Affidavit or in amounts larger than those listed in this Affidavit may be barred unless:
- (a) A claim is presented to the affiant within four (4) months of the filing of this Affidavit at the address stated in this Affidavit for presentment of claims; or,
- (b) A Personal Representative of the Estate is appointed within the time allowed under ORS 114.555.

Kerene Gross

317 S. Poinsettia Avenue

Compton, CA 90221

Telephone Number: (310) 977-4797

STATE OF CALIFORNIA COUNTY OF LOS ANGELES Subscribed and sworn to (or affirmed) before me, Carona A. Yook, a Notary Public, on this 19 day of June 2012, by Kerene Gross, proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me. Notary public for California My commission expires: 5-5-2016

COUNTY OF LOS ANGELES DEPARTMENT OF PUBLIC HEALTH

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| | 6141 CAPETOWN STREE | <u> </u> | | 19.69 | TOO AND | | |
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| | 35. NAME OF MOTHER/PARENT-FIRST | 36. MIDO | N.E. | in the late with | IRTH NAME) | . Mar Jús | 38. BIRTH STATE |
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This is a true certified copy of the record filed in the County of Los Angeles Department of Public Health if it bears the Registrar's signature in purple ink.



HD1778428*

DATE ISSUED

Director of Public Health and Registrates than Esterday 037

This copy not valid unless prepared on engraved border displaying seal and signature of Registrar.



EXEMPLIFICATION

Estate of Richard A. Endres

CASE NUMBER: VP013703



I, JOHN A. CLARKE, Executive Officer/Clerk of the Superior Court of the State of California for the County of Los Angeles do hereby certify and attest that I am the custodian of records of the said Court, and that the foregoing is a full, true and correct copy of the original

on file or of record in my office, and that I have carefully compared the same with the original.

Executed and Seal of Said Court Affixed at Los Angeles, California on $\frac{100}{100} \frac{3}{100} \frac{2011}{100}$

and with

EXECUTIVE OFFICER/CLERK OF THE SUPERIOR COURT OF THE STATE OF CALEOBIA FOR THE COUNTY OF LOS ANGELES

STATE OF CALIFORNIA COUNTY OF LOS ANGELES

I, LEE SMALLEY EDMON, Presiding Judge of the Superior Court of the State of California for the County of Los Angeles do hereby certify that JOHN A. CLARKE is Executive Officer/Clerk of the Superior Court of the State of California for the County of Los Angeles (which is a court of record having by law a seal); that the signature to the foregoing certificate and attestation is the genuine signature of the said JOHN A. CLARKE as such officer, that the seal annexed thereto is the seal of said Superior Court, that said JOHN A. CLARKE as such officer is the legal custodian of the original records or documents described and referred to in the foregoing certificate; is the proper officer having the authority to execute and said certificate and attestation, and such attestation is in due and proper form according to the laws of the State of California.

Executed at Los Angeles, California on _

JUN 0 3 2011

PRESIDING JUDGE OF THE SUPERIOR COURT OF THE STATE OF CALIFORNIA FOR THE COUNTY OF LOS ANGELES

usmally Edmon

STATE OF CALIFORNIA COUNTY OF LOS ANGELES



I, DEAN C. LOGAN, Registrar-Recorder/County Clerk of the County of Los Angeles, State of California, the same being a public entity having by law a seal, do hereby certify that LEE SMALLEY EDMON, whose name is subscribed to the foregoing certificate of due and proper attestation was, at the time of signing same; Presiding Judge of the Superior Court aforesaid and was duly commissioned, qualified and authorized by law to execute sald certificate. And I do further certify that the oath of office, or a true and correct copy thereof, of the judge above named is on file or of record in my office, that I am well acquainted with his handwriting, and verily believe the signature of the said judge to the said certificate to be genuine.

REGISTRAR-RECORDER/COUNTY CLERK/OF TI) E COUNTY OF LOS ANGELES

EXEMPLIFICATION

FILED 5-4 20 11

LAST WILL OF

RICHARD A. ENDRES

JOHN A. CLARKE, County Clerk/ Executive Officer of the Superior Court of California, County of

Los Anggles

I, RICHARD A. ENDRES, a resident of Los Angeles County, California, declare that this is my will. I hereby revoke all my previous wills and codicils.

ARTICLE ONE

INTRODUCTORY PROVISIONS

- 1.1. Marital Status. I am not currently married.
- 1.2. No Children. I have never had any children.
- 1.3. <u>No Contract Affecting Will</u>. I have not entered into any contract to make a will or a testamentary gift, not to revoke a will or a testamentary gift, or to die intestate.
- 1.4. No Exercise of Power of Appointment. I intentionally refrain from exercising any power of appointment that I now possess or that hereafter may be conferred on me.

ARTICLE TWO

GIFT OF ENTIRE ESTATE

2.1. Gift of Entire Estate. I give all of my property to the trustee of the RICHARD A.

ENDRES REVOCABLE TRUST Dated February 12, 2010, created under the declaration of trust executed on the same date as, but immediately before, the execution of this will, by RICHARD A. ENDRES as settlor and trustee. The trustee of that trust shall add the property disposed of under this will to the trust principal and hold, administer, and distribute the property in

accordance with the provisions of that declaration of trust, including any amendments of that declaration of trust that have been made before or after execution of this will.

ARTICLE THREE

RESIDUARY PROVISIONS

3.1. <u>Disposition of Residue</u>. If the RICHARD A. ENDRES REVOCABLE TRUST Dated February 12, 2010 has been revoked, terminated, or declared invalid for any reason, I give the residue of my estate to the executor of this will, as trustee, who shall hold, administer, and distribute the property under a testamentary trust, the terms of which shall be identical to the terms of the RICHARD A. ENDRES REVOCABLE TRUST Dated February 12, 2010 that are in effect on the date of execution of this will or such later date on which this will is republished.

ARTICLE FOUR

EXECUTOR

- 4.1. <u>Nomination of Executor</u>. I nominate KERENE GROSS, my friend, as executor of this will.
- 4.2. <u>Successor Executors</u>. If KERENE GROSS is unable (by reason of death, incapacity, or any other reason) or unwilling to serve as executor, or if at any time the office of executor becomes vacant, by reason of death, incapacity, or any other reason, and no successor executor or coexecutors have been designated under any other provision of this will, then I nominate PHILIP R. HALL, my brother, as successor executor. If PHILIP R. HALL is unwilling or unable to serve as successor executor, a new executor or coexecutors shall be appointed by the court.
- 4.3. <u>Waiver of Bond</u>. No bond or undertaking shall be required of any executor nominated in this will.

- 4.4. <u>General Powers of Executor</u>. The executor shall have full authority to administer my estate under the California Independent Administration of Estates Act. The executor shall have all powers now or hereafter conferred on executors by law, except as otherwise specifically provided in this will, including any powers enumerated in this will.
- 4.5. <u>Power to Invest</u>. The executor shall have the power to invest estate funds in any kind of real or personal property, as the executor deems advisable.
- 4.6. <u>Division or Distribution in Cash or in Kind</u>. In order to satisfy a pecuniary gift or to distribute or divide estate assets into shares or partial shares, the executor may distribute or divide those assets in kind, or divide undivided interests in those assets, or sell all or any part of those assets and distribute or divide the property in cash, in kind, or partly in cash and partly in kind. Property distributed to satisfy a pecuniary gift under this will shall be valued at its fair market value at the time of distribution. This section shall apply only to the extent that it does not conflict with the provisions of the RICHARD A. ENDRES REVOCABLE TRUST Dated February 12, 2010.
- 4.7. <u>Power to Sell, Lease, and Grant Options to Purchase Property</u>. The executor shall have the power to sell, at either public or private sale and with or without notice, lease, and grant options to purchase any real or personal property belonging to my estate, on such terms and conditions as the executor determines to be in the best interest of my estate.
- 4.8. <u>Power to Purchase Estate Property</u>. The executor shall have the power to sell any property of my estate to, or exchange any property of my estate with the property of, any person serving as executor at the time of the sale or exchange, provided that any such sale or exchange shall be for adequate consideration.
- 4.9. <u>Payments to Legally Incapacitated Persons</u>. If at any time any beneficiary under this will is a minor or it appears to the executor that any beneficiary is incapacitated, incompetent, or

for any other reason not able to receive payments or make intelligent or responsible use of the payments, then the executor, in lieu of making direct payments to the beneficiary, may make payments to the beneficiary's conservator or guardian; to the beneficiary's custodian under the Uniform Gifts to Minors Act or Uniform Transfers to Minors Act of any state; to the beneficiary's custodian under the California Uniform Transfers to Minors Act until the beneficiary reaches the age of twenty-five (25); to one or more suitable persons, as the executor deems proper, such as a relative or a person residing with the beneficiary, to be used for the benefit of the beneficiary; to any other person, firm, or agency for services rendered or to be rendered for the beneficiary's assistance or benefit; or to accounts in the beneficiary's name with financial institutions. If there is no custodian then-serving or nominated to serve by me for a beneficiary, the personal representative or executor, as the case may be, shall designate the custodian. The receipt of payments by any of the foregoing shall constitute a sufficient acquittance of the executor for all purposes.

4.10. Allocation of Basis. I authorize the executor in the exercise of sole and absolute discretion to make any adjustments to basis authorized by law, including but not limited to, increasing the basis of any property included in my estate, whether or not passing under this instrument, by allocating any amount by which the basis of assets may be increased. My executor will be under no duty and shall be required to allocate the basis increase exclusively, primarily or at all to assets passing under this instrument as opposed to other property including in my estate. My executor may elect, in the exercise of sole and absolute discretion, without permission of any court or other authority to allocate basis increase to one or more of all assets the executor receives or in which executor has personal interest to the partial or total exclusion of other assets with respect to which such election could be made. Any such allocation shall not cause my executor to be liable to any person or be subject to removal or forfeiture of other compensation.

ARTICLE FIVE

CONCLUDING PROVISIONS

- 5.1. <u>Definition of Death Taxes</u>. The term "death taxes," as used in this will, shall mean all inheritance, estate, succession, and other similar taxes that are payable by any person on account of that person's interest in my estate or by reason of my death, including penalties and interest, but excluding the following:
 - (a) Any additional tax that may be assessed under Internal Revenue Code Section 2032A.
 - (b) Any federal or state tax imposed on a "generation-skipping transfer," as that term is defined in the federal tax laws, unless the applicable tax statutes provide that the generation-skipping transfer tax on that transfer is payable directly out of the assets of my gross estate.
- 5.2. <u>Payment of Death Taxes</u>. The executor shall pay death taxes, whether or not attributable to property inventoried in my probate estate, by prorating and apportioning them among the persons interested in my estate as provided in the California Probate Code.
- 5.3. <u>Simultaneous Death</u>. If any beneficiary under this will and I die simultaneously, or if it cannot be established by clear and convincing evidence whether that beneficiary or I died first, I shall be deemed to have survived that beneficiary, and this will shall be construed accordingly.
- 5.4. <u>Period of Survivorship</u>. For the purposes of this will, a beneficiary shall not be deemed to have survived me if that beneficiary dies within thirty (30) days after my death.
- 5.5. <u>Intentional Omission of Children Born or Adopted After Execution of Will</u>. Except as otherwise provided in this will, I have intentionally failed to provide in this will for any children born to or adopted by me after the execution of this will.
- 5.6. <u>No-Contest Clause</u>. If any person, directly or indirectly, contests the validity of this will in whole or in part, or opposes, objects to, or seeks to invalidate any of its provisions, or

seeks to succeed to any part of my estate otherwise than in the manner specified in this will, any gift or other interest given to that person under this will shall be revoked and shall be disposed of as if he or she had predeceased me without issue.

5.7. <u>Definition of Incapacity</u>.

- (a) For purposes of this will, a person is deemed "incapacitated" or deemed to suffer from "incapacity" if any of the following circumstances apply:
 - (1) Either a medical doctor, board-certified neuropsychologist, or a board-certified psychiatrist, not related by blood or marriage to any executor or beneficiary, examines such person and declares under penalty of perjury that such person is either temporarily or permanently incapacitated, according to generally accepted medical definitions.
 - (2) The person is operating under a legal disability, such as a duly established conservatorship.
- (b) In case of temporary incapacity of a sole executor, the successor executor designated under this will shall serve during the period of temporary incapacity as though he or she were the only executor. In case of temporary incapacity of a coexecutor, the other coexecutor shall make any and all decisions during the period of temporary incapacity as though that coexecutor were the only executor.
- (c) Any executor deemed to be temporarily incapacitated shall be deemed to be permanently incapacitated 90 days after the determination of temporary incapacity unless a determination of capacity is made within that 90-day period. If a determination of capacity is made, the executor may resume serving as executor. If there is a subsequent determination of incapacity, the executor has another 90-day period to obtain a determination of capacity.
- (d) Any successor executor or coexecutor serving in place of a temporarily incapacitated executor shall not be relieved of liability until that executor's account has been settled or an account has been waived by a majority of all current beneficiaries of the estate.
- (e) If any executor or any beneficiary whose capacity is in question disputes the determination of incapacity under any of the standards listed above, such person may petition the court for a finding regarding that person's capacity. The court's finding shall be conclusive. If the court determines that the executor or other person whose capacity is in question has capacity, the estate property shall bear all expenses associated with the examination or court proceeding. If the court sustains the determination of incapacity, the individual challenging the determination of incapacity shall bear all expenses of the examination or court proceeding.

- (f) Each individual executor agrees to cooperate in any examination reasonably necessary for the purpose of determining capacity, agrees to waive the doctor-patient privilege in respect to the results of such examination, and agrees to provide written authorization in compliance with the privacy regulations under the Health Insurance Portability and Accountability Act of 1996 (42 U.S.C. Section 1320d) and the provisions of California Civil Code Section 56.10 for the disclosure and use of that executor's health information and medical records to the extent that such disclosure and use are necessary to make a determination of the executor's capacity. Refusal to submit to the examination, to provide the waiver, or to provide the written authorization when requested by the successor executor shall be deemed a resignation by that executor.
- 5.8. Number and Gender. As used in this will, references in the masculine gender shall be deemed to include the feminine and neuter gender, and vice versa, and references to the singular shall be deemed to include the plural, and vice versa, wherever the context so permits.
- 5.9. <u>Captions</u>. The captions appearing in this will are for convenience of reference only, and shall be disregarded in determining the meaning and effect of the provisions of this will.
- 5.10. Severability Clause. If any provision of this will is invalid, that provision shall be disregarded, and the remainder of this will shall be construed as if the invalid provision had not been included.
- 5.11. <u>California Law to Apply</u>. All questions concerning the validity and interpretation of this will, including any trusts created by this will, shall be governed by the laws of the State of California in effect at the time this will is executed.

Executed on February 12, 2010, at Bellflower, California.

RICHARD A. ENDRES

On the date written above, we, the undersigned, each being present at the same time, witnessed the signing of this instrument by RICHARD A. ENDRES, who declared to us that this

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instrument was the will of RICHARD A. ENDRES. At that time, RICHARD A. ENDRES appeared to us to be of sound mind and memory and, to the best of our knowledge, was not acting under fraud, duress, menace, or undue influence. Understanding this instrument, which consists of <u>eight (8)</u> pages, including the pages on which the signature of RICHARD A. ENDRES and our signatures appear, to be the will of RICHARD A. ENDRES, we subscribe our names as witnesses thereto.

We declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on February 12, 2010, at Bellflower, California.

| Witness | residing at UTC Suite 250 Street Address Beach, California City |
|---------------------------|---|
| Megan DeCallibrus Witness | residing at One World Trade Center, SHE 295 Street Address Long Bluch, California City |