

Edgar Filing: BERGSTROM ERIK E - Form SC 13G/A

BERGSTROM ERIK E  
Form SC 13G/A  
January 26, 2005

UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION  
WASHINGTON, D.C. 20549

SCHEDULE 13G  
(Rule 13d-102)

INFORMATION TO BE INCLUDED IN STATEMENTS FILED PURSUANT TO  
RULES 13d-1(b), (c), AND (d) AND AMENDMENTS THERETO FILED PURSUANT TO  
RULE 13d-2(b)

(Amendment No. 6)

THE ADAMS EXPRESS COMPANY  
-----

(Name of Issuer)

Common Stock  
-----

(Title of Class of Securities)

006212104  
-----

(CUSIP Number)

December 31, 2004  
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(Date of Event which Requires Filing of this Statement)

Check the appropriate box to designate the rule pursuant to which  
this Schedule is filed:

☐ Rule 13d-1(b)

☒ Rule 13d-1(c)

☐ Rule 13d-1(d)

\*The remainder of this cover page shall be filled out for a reporting  
person's initial filing on this form with respect to the subject class  
of securities, and for any subsequent amendment containing information  
which would alter the disclosures provided in a prior cover page.

The information required in the remainder of this cover page shall not  
be deemed to be "filed" for the purpose of Section 18 of the Securities  
Exchange Act of 1934 ("Act") or otherwise subject to the liabilities of  
that section of the Act but shall be subject to all other provisions of  
the Act (however, see the Notes).

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1 Name of Reporting Person

Erik E. Bergstrom

IRS Identification No. of Above Person

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2	Check the Appropriate Box if a member of a Group	(a) <input type="checkbox"/>	(b) <input checked="" type="checkbox"/>
3	SEC USE ONLY		
4	Citizenship or Place of Organization		USA
	NUMBER OF SHARES	5	Sole Voting Power
			0
	BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6	Shared Voting Power
			7,295,002
		7	Sole Dispositive Power
			0
		8	Shared Dispositive Power
			7,295,002
9	Aggregate Amount Beneficially Owned by Each Reporting Person		7,295,002
10	Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares		<input checked="" type="checkbox"/> *
11	Percent of Class Represented by Amount in Row 9		8.5%
12	Type of Reporting Person		IN

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\*See response to Item 4.

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1	Name of Reporting Person	Erik E. Bergstrom Living Trust U/A Dated 12/6/74
	IRS Identification No. of Above Person	
2	Check the Appropriate Box if a member of a Group	(a) <input type="checkbox"/> (b) <input checked="" type="checkbox"/>
3	SEC USE ONLY	
4	Citizenship or Place of Organization	California
	NUMBER OF SHARES	5
		Sole Voting Power
		0
	BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6
		Shared Voting Power
		2,565,000
		7
		Sole Dispositive Power
		0
		8
		Shared Dispositive Power
		2,565,000
9	Aggregate Amount Beneficially Owned by Each Reporting Person	2,565,000 2,565,000
10	Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares	<input type="checkbox"/>

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11 Percent of Class Represented by Amount in Row 9 3.0%

12 Type of Reporting Person 00

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1 Name of Reporting Person Edith H. Bergstrom

IRS Identification No. of Above Person

2 Check the Appropriate Box if a member of a Group (a) [ ]  
(b) [x]

3 SEC USE ONLY

4 Citizenship or Place of Organization USA

NUMBER OF SHARES	5	Sole Voting Power	0
BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6	Shared Voting Power	85,000
	7	Sole Dispositive Power	0
	8	Shared Dispositive Power	85,000

9 Aggregate Amount Beneficially Owned by Each Reporting Person 85,000

10 Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares [ ]

11 Percent of Class Represented by Amount in Row 9 0.1%

12 Type of Reporting Person IN

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1 Name of Reporting Person Edith H. Bergstrom Living Trust U/A  
Dated 12/6/74

IRS Identification No. of Above Person

2 Check the Appropriate Box if a member of a Group (a) [ ]  
(b) [x]

3 SEC USE ONLY

4 Citizenship or Place of Organization California

NUMBER OF SHARES	5	Sole Voting Power	0
BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6	Shared Voting Power	85,000
	7	Sole Dispositive Power	0
	8	Shared Dispositive Power	85,000

9 Aggregate Amount Beneficially Owned by Each Reporting

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Person	85,000
10 Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares	[ ]
11 Percent of Class Represented by Amount in Row 9	0.1%
12 Type of Reporting Person	00

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1	Name of Reporting Person	Erik E. and Edith H. Bergstrom Foundation, a Charitable Trust
	IRS Identification No. of Above Person	
2	Check the Appropriate Box if a member of a Group	(a) [ ] (b) [x]
3	SEC USE ONLY	
4	Citizenship or Place of Organization	California
	NUMBER OF SHARES	5 Sole Voting Power 0
	BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6 Shared Voting Power 4,630,002
		7 Sole Dispositive Power 0
		8 Shared Dispositive Power 4,630,002
9	Aggregate Amount Beneficially Owned by Each Reporting Person	4,630,002
10	Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares	[ ]
11	Percent of Class Represented by Amount in Row 9	5.4%
12	Type of Reporting Person	CO

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1	Name of Reporting Person	Sharon's Trust
	IRS Identification No. of Above Person	
2	Check the Appropriate Box if a member of a Group	(a) [ ] (b) [x]
3	SEC USE ONLY	
4	Citizenship or Place of Organization	California
	NUMBER OF SHARES	5 Sole Voting Power 0
	BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH	6 Shared Voting Power 100,000

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OWNED BY EACH		
REPORTING	7	Sole Dispositive Power 0
PERSON WITH		
	8	Shared Dispositive Power 100,000
9	Aggregate Amount Beneficially Owned by Each Reporting Person 100,000	
10	Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares [ ]	
11	Percent of Class Represented by Amount in Row 9 0.1%	
12	Type of Reporting Person 00	

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Item 1(a). Name of Issuer:

The Adams Express Company

Item 1(b). Address of Issuer's Principal Executive Offices:

7 St. Paul Street, Suite 1140, Baltimore, Maryland 21202

Item 2(a). Names of Persons Filing:

Erik E. Bergstrom  
 Erik E. Bergstrom Living Trust U/A Dated 12/6/74  
 Edith H. Bergstrom  
 Edith H. Bergstrom Living Trust U/A Dated 12/6/74  
 Erik E. and Edith H. Bergstrom Foundation, a Charitable Trust  
 Sharon's Trust

Item 2(b). Address of Principal Business Office or, if none, Residence:

The business address of Erik E. Bergstrom, Erik E. Bergstrom Living Trust U/A Dated 12/6/74, Edith H. Bergstrom and Edith H. Bergstrom Living Trust U/A Dated 12/6/74 is P.O. Box 126, Palo Alto, California 94302. The business address of the Erik E. and Edith H. Bergstrom Foundation, a Charitable Trust is P.O. Box 520, Palo Alto, California 94302. The business address of Sharon's Trust is 61720 Lime Quarry Road, Enterprise, Oregon 97828.

Item 2(c). Citizenship:

See Items 4 to pages 2-7 which Items are incorporated by reference herein.

Item 2(d). Title of Class of Securities:

Common Stock

Item 2(e). CUSIP Number:

006212104

Item 3. If this statement is filed pursuant to Sections 240.13d-1(b) or 240.13d-2(b) or (c), check whether the person filing is a:

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- (a) ☐ Broker or dealer registered under section 15 of the Act (15 U.S.C. 78o).
- (b) ☐ Bank as defined in section 3(a)(6) of the Act (15 U.S.C. 78c).
- (c) ☐ Insurance company as defined in section 3(a)(19) of the Act (15 U.S.C. 78c).
- (d) ☐ Investment company registered under section 8 of the Investment Company Act of 1940 (15 U.S.C. 80a-8).

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- (e) ☐ An investment adviser in accordance with Section 240.13d-1(b)(1)(ii)(E);
- (f) ☐ An employee benefit plan or endowment fund in accordance with Section 240.13d-1(b)(1)(ii)(F);
- (g) ☐ A parent holding company or control person in accordance with Section 240.13d-1(b)(1)(ii)(G);
- (h) ☐ A savings associations as defined in Section 3(b) of the Federal Deposit Insurance Act (12 U.S.C. 1813);
- (i) ☐ A church plan that is excluded from the definition of an investment company under section 3(c)(14) of the Investment Company Act of 1940 (15 U.S.C. 80a-3);
- (j) ☐ Group, in accordance with Section 240.13d-1(b)(1)(ii)(J).

## Item 4. Ownership.

The following table specifies as of January 17, 2005 the number of shares of Common Stock as to which each person named in Item 2(a) has sole or shared power to vote or direct the vote or to dispose or direct the disposition, as well as the percentages such shares constitute of the Common Stock reported to be outstanding as of December 31, 2004.

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Name	Sole Voting and Dispositive	Shared Voting and Dispositive	Aggregate Number of	Percentage of Outstanding