

Edgar Filing: ADAMS EXPRESS CO - Form SC 13G

ADAMS EXPRESS CO  
Form SC 13G  
January 29, 2004

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. 5)

THE ADAMS EXPRESS COMPANY  
-----

(Name of Issuer)

Common Stock  
-----

(Title of Class of Securities)

006212104  
-----

(CUSIP Number)

December 31, 2003  
-----

(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

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      | 6,900,000 |
|  | 7 | Sole Dispositive Power   | 0         |
|  | 8 | Shared Dispositive Power | 6,900,000 |

9 Aggregate Amount Beneficially Owned by Each Reporting Person 6,900,000

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

11 Percent of Class Represented by Amount in Row 9 8.1%

12 Type of Reporting Person IN

---

\*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) [ ]  
 (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      | 2,400,000 |
|  | 7 | Sole Dispositive Power   | 0         |
|  | 8 | Shared Dispositive Power | 2,400,000 |

9 Aggregate Amount Beneficially Owned by Each

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|    |  |           |
|----|--|-----------|
|    | Reporting Person   | 2,400,000 |
| 10 | Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares | [ ]       |
| 11 | Percent of Class Represented by Amount in Row 9                      | 2.8%      |
| 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 BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH    |                    |
|    | 5 Sole Voting Power  | 0                  |
|    | 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<br>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 BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH |  |
|   | 5 Sole Voting Power   | 0  |
|   | 6 Shared Voting Power   | 85,000   |
|   | 7 Sole Dispositive Power  | 0  |

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PERSON WITH  
 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 OO

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1 Name of Reporting Person Federal United Corporation  
 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 Delaware  
 NUMBER OF 5 Sole Voting Power 0  
 SHARES  
 BENEFICIALLY 6 Shared Voting Power 0  
 OWNED BY EACH 7 Sole Dispositive Power 0  
 REPORTING PERSON WITH 8 Shared Dispositive Power 0  
 9 Aggregate Amount Beneficially Owned by Each Reporting Person 0  
 10 Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares [ ]  
 11 Percent of Class Represented by Amount in Row 9 0.0%  
 12 Type of Reporting Person CO

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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 5 Sole Voting Power 0  
 SHARES

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|  |  |                          |           |
|--|--|--------------------------|-----------|
| BENEFICIALLY OWNED BY EACH REPORTING PERSON WITH | 6  | Shared Voting Power      | 4,400,000 |
|  | 7  | Sole Dispositive Power   | 0         |
|  | 8  | Shared Dispositive Power | 4,400,000 |
| 9  | Aggregate Amount Beneficially Owned by Each Reporting Person         |                          | 4,400,000 |
| 10   | Check Box if the Aggregate Amount in Row (9) Excludes Certain Shares |                          | [ ]       |
| 11   | Percent of Class Represented by Amount in Row 9                      |                          | 5.2%      |
| 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      |
|  | 7  | Sole Dispositive Power 0         |
|  | 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   |                                  |
|  |  | OO                               |

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Item 1(a). Name of Issuer:  
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The Adams Express Company  
-----

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

Seven St. Paul Street, Suite 1140, Baltimore,

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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  
Federal United Corporation  
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:

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The business address of 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, and Federal United Corporation 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 13781 Strubel's Lane, Grass Valley, California 95949.

Item 2(c). Citizenship:

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See Items 4 to cover pages which Items are incorporated by reference herein.

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

-----  
Common Stock

Item 2(e). CUSIP Number:

-----  
006212104

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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:

- (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

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the Investment Company Act of 1940 (15 U.S.C. 80a-8).

- (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.

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The following table specifies as of December 31, 2003 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, 2003.

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| Name (1) | Sole Voting and Dispositive | Shared Voting and Dispositive | Aggregate Number of | Percentage of Outstanding |
|----------|-----------------------------|-------------------------------|---------------------|---------------------------|
|----------|-----------------------------|-------------------------------|---------------------|---------------------------|