

After Recording Please Return To:
SHELTER BAY COMPANY
1000 Shoshone Drive
La Conner, WA 98257

Real Estate Excise Tax
Exempt
Skagit County Treasurer
By Kaylee Oudman
Affidavit No. 20262193
Date 07/14/2026

SHELTER BAY ASSIGNMENT OF SUBLEASE

KNOW ALL MEN BY THESE PRESENTS THAT:

KATHRYN E. MORTEN, wife, and LISA GOODWIN, by and through their Guardian and Conservator for Richard D Morten, husband

Lessee(s) of a certain sublease dated the 11th day of November, 1971

Wherein SHELTER BAY COMPANY, a Washington corporation, appears as Lessor, recorded on the 11th day of May, 1976 in accordance with Short Form Sublease No. 475 (Master Lease No. 5020, Contract No. 14-20-0500-2949) in records of Skagit County, Auditor's Filing No. 834745, Volume 217, Pages 582-583, hereinafter known as Assignor, for and in consideration of the sum of ten dollars and other valuable consideration paid for assignment of said sublease, receipt of which is hereby acknowledged by **KATHRYN E. MORTEN, wife, and LISA GOODWIN, by and through their Guardian and Conservator for Richard D Morten, husband**

Assignor(s), whose address is: 475 Nez Perce Place, La Conner, WA 98257

ASSIGNOR assigned and set over, and by these presents does grant, assign and set over unto the said **KATHRYN E. MORTEN, a married person, as their separate property.**

Assignee(s), whose address is: 475 Nez Perce Place, La Conner, WA 98257

The within indenture of Sublease, and all right, title and interest now owned or hereafter acquired, of said Assignor(s), in said Sublease including any buildings and appurtenances thereto, and also all estate, right, title, term of years yet to come, claim and demand whatsoever of, in to or out of the same, to have and to hold the said estate and right, title and interest of the Lessee(s) as a member of Shelter Bay Community, Inc., a Non-profit Washington corporation in accordance with and subject to the Articles of Incorporation and By-Laws and rules and regulations of Shelter Bay Community, Inc. As a part of the consideration the Assignee(s) assumes and agrees to pay the annual lease payments provided for in said sublease and the maintenance fees and assessments, if any, of Shelter Bay Community, Inc. from time to time as they become due. **The next annual sublease payment payable to Shelter Bay Company, in the amount of \$559.00 is due and payable on the 1st day of June, 2027.**

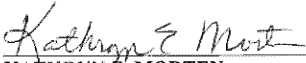
PRIOR ASSIGNMENT of Sublease from: Sheila Kibbee, as Personal Representative of the Estate of Beverly J. Erickson to Richard D. Morten and Kathryn E. Morten recorded under Auditor's File No. 201701100114. Richard D. Morten, by and through their Guardian and Conservator's Plan, recorded under the Superior Court of the State of Washington in and for Skagit County File No. 25-4-00532-29, dated April 30, 2026, and attached hereto as Exhibit "A".

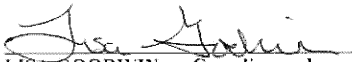
THE REAL ESTATE described in said lease is as follows:

Lot 475, "SURVEY OF SHELTER BAY DIVISION NO. 3, Tribal and Allotted Lands of Swinomish Indian Reservation", as recorded in Volume 43 of Official Records, pages 839 to 842, inclusive, under Auditor's File No. 737014, and amendment thereto recorded in Volume 66 of Official Records, page 462, under Auditor's File No. 753731, records of Skagit County, Washington.
Situate in the County of Skagit, State of Washington.

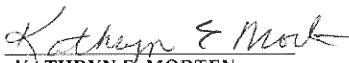
P129270 S33025020151 Geo ID: 5100-003-475-0000
IN WITNESS WHEREOF the parties have hereto signed this instrument this 18th day of June, 2026.

Assignor(s):


KATHRYN E. MORTEN


LISA GOODWIN, as Guardian and
Conservator for Richard D. Morten

Assignee(s):


KATHRYN E. MORTEN

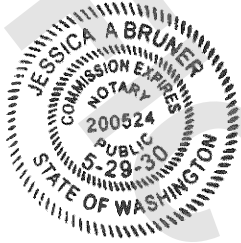
STATE OF WASHINGTON)
) SS.
 COUNTY OF WHATCOM)

On this 18th day of June, 2026 before me, the undersigned, a Notary Public in and for the State of Washington, duly commissioned and sworn, personally appeared

LISA GOODWIN

I CERTIFY that I know or have satisfactory evidence **LISA GOODWIN** is the person who appeared before me, and said person acknowledged that she signed this instrument, on oath stated she is authorized to execute the instrument and is the **Guardian and Conservator of RICHARD D. MORTEN** to be the free and voluntary act of such party for the uses and purposes mentioned in this document.

WITNESS my hand and official seal hereto affixed the day and year in the certificate above written.



Jessica A. Bruner
 JESSICA A. BRUNER
 Notary Public in and for the
 State of Washington
 Residing in Bellingham
 My commission expires: 05/29/2030

STATE OF WASHINGTON)
) SS.
 COUNTY OF WHATCOM)

On this 18th day of June, 2026 before me, the undersigned, a Notary Public in and for the State of Washington, duly commissioned and sworn, personally appeared

KATHRYN E. MORTEN

to me known to be the individual described in and who executed the foregoing instrument and acknowledged to me that they signed and sealed the said instrument as their free and voluntary act and deed for the uses and purposes therein mentioned.

WITNESS my hand and official seal hereto affixed the day and year in this certificate above written.

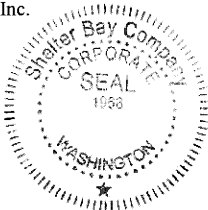


Jessica A. Bruner
 JESSICA A. BRUNER
 Notary Public in and for the
 State of Washington
 Residing in Bellingham
 My commission expires: 05/29/2030

CONSENT OF LESSOR

SHELTER BAY COMPANY, Seller in the above described Sublease, does hereby consent to the above assignment of the aforesaid Sublease, subject to payments being made from time to time by the Assignee(s) hereof in accordance with said sublease to cover purchase of sublease, annual lease payments and maintenance fees and assessments for Shelter Bay Community, Inc. as they become due. This consent does not relieve the Assignor(s) from the obligation to make said payments in the event the Assignee(s) does not make said payment, and by this consent Shelter Bay Company does hereby consent to the assignment of membership in Shelter Bay Community, Inc. to the Assignee(s) subject to the approval of the Board of Trustees of Shelter Bay Community, Inc.

Date: *July 1, 2026*



SHELTER BAY COMPANY

Ann Secuelf
 Community Manager
 Ann Secuelf

SKAGIT COUNTY, WASH
FILED

APR 3 0 2026

MELISSA BEATON, CO. CLERK
Deputy

EXHIBIT "A"

25-4-00532-29
ORAPRT 33
Order Approving Report
20843290



**IN THE SUPERIOR COURT OF THE STATE OF WASHINGTON
IN AND FOR SKAGIT COUNTY**

In re Guardianship/Conservatorship of:

Cause No. 25-4-00532-29

RICHARD D. MORTEN,

ORDER:

1. APPROVING GUARDIAN/
CONSERVATOR'S PLAN;
2. AUTHORIZING TRANSFER OF
ASSETS FOR MEDICAID
ELIGIBILITY;
3. APPROVING FEES AND COSTS;
and
4. AUTHORIZING REIMBURSEMENT
TO GUARDIAN/CONSERVATOR

Individual.

GUARDIANSHIP/CONSERVATORSHIP SUMMARY

Date Guardian/Conservator Appointed: January 8, 2026

Due Date for Report: By April 8, 2027

Date of Next Review: By May 8, 2027

Letters Expire On: June 8, 2027

Bond Amount: None

Restricted Account
Agreements Required: No

ORDER APPROVING GUARDIAN AND
CONSERVATOR'S PLAN

1

ELDERLAW
MEYERS, NEUBECK & HULFORD

2828 Northwest Ave, Bellingham, WA 98225
T: 360.647.8846 F: 360.647.8854

<u>Individual Subject to</u> <u>Guardianship/Conservatorship:</u>	<u>Guardian/Conservator:</u>
Name: Richard D. Morten	Name: Lisa K. Morten
Address: Birchview Memory Care 925 Dunlop Ave. Sedro-Woolley, WA 98284	Address: 10836 180th Ct. NE Redmond, WA 98052
Phone: N/A	Phone: 206-617-6545

<u>Notice Parties</u>	<u>Address</u>	<u>Relationship to Individual</u>
Kathryn Morten	475 Nez Perce Pl. La Conner, WA 98257	Spouse
Krista Lynn Morten	1790 Galore Pl. Kamloops, B.C. Canada V2E 0A7	Daughter
HCS / DDA HIU	PO Box 45826 Olympia, WA 98504-5826	N/A

Based upon the petition of the Guardian/Conservator and the documents filed with the petition, ***the court makes the following findings of fact:***

I. Findings of Fact

1.1 Acts of Guardian/Conservator

All acts required of the Guardian/Conservator to date have been performed.

1.2 Notice

Notice has been properly provided to persons entitled to notice of this presentation.

1.3 Objections

There were no objections filed to the Guardian/Conservator's Plan by notice parties or the Individual.

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1.4 Plan and Proposed Budget

The Guardian/Conservator's Plan and Proposed Budget are reasonable and appropriate to the needs of the Individual and should be approved.

1.5 Attorney Fees and Costs

The attorney fees and costs incurred by the Guardian/Conservator in the amount of \$4,552.71 for the period from July 5, 2025 to April 6, 2026 are found to be reasonable and appropriate.

1.6 Transfer of Assets for Medicaid Eligibility

It is proper and in the best interests of the Individual for the Conservator to transfer the Individual's interest in community assets, consisting of real and personal property, to KATHRYN E. MORTEN.

II. Orders**2.1 Approval of Plan**

The Guardian/Conservator's Plan is approved.

2.2 Approval of Inventory

The Conservatorship Inventory is approved.

2.3 Budget

The Guardian/Conservator is authorized to continue to receive the Individual's income and to apply the income and other resources toward the Individual's expenses according to the budget contained within the Guardian/Conservator's Plan.

2.4 Medical and Dental Expenses

The Guardian/Conservator is authorized to incur and pay reasonable and necessary medical and dental expenses that the Guardian/Conservator determines to be in the

best interest of the Individual.

2.5 Income Tax Payments/Accounting Fees

The Guardian/Conservator is authorized to make payments for income tax due as required, and to pay fees for accounting services required in connection with the preparation of income tax returns.

2.6 Miscellaneous Expenses

The Guardian/Conservator is authorized to pay all expenses incurred by way of fees of the Clerk of the Court, together with additional expenses incurred up to the amount of \$200 per month in connection with this guardianship/conservatorship.

2.7 Home Repairs and Maintenance

The Guardian/Conservator is authorized to spend up to \$2,500.00 for necessary home repairs and maintenance of the home and real property of the Individual without further order of the Court.

2.8 Reporting Due Date

The first Report of the guardianship/conservatorship shall be filed no later than April 8, 2027 (within three months of the anniversary of appointment).

2.9 Bond / Blocked Accounts

Bond and blocking provisions are waived pending further order from this court.

2.10 Guardian/Conservator Allowance

A monthly allowance pursuant to RCW 11.130.105 of \$235 is authorized for payment from the Individual's estate to the Guardian/Conservator as compensation for services rendered. The Court will be provided the opportunity to review the monthly allowance at the time of the Guardian/Conservator's next report. If the Individual is a Medicaid

1 recipient, the Guardian/Conservator allowance should be paid from the Individual's
2 Social Security benefits following DSHS calculation of his share of costs of care. DSHS
3 should be required to confirm the attorney fees in writing, or by adjusting the award
4 letter or document setting the department client's share of cost of care per WAC 182-
5 513-1530 and/or 388-79A-015, within thirty (30) days of receipt of the Order hereon.
6

7 **2.11 Attorney Fees and Costs**

8 The Guardian/Conservator's attorney fees and costs in the amount of \$4,552.71 for the
9 period from July 5, 2025 to April 6, 2026, as further described in the Declaration of
10 Attorney in Support of Fees and Costs, are hereby approved as reasonable and the
11 court authorizes payment of on-going attorney fees and costs as they are incurred from
12 Conservatorship assets, subject to court review and approval.
13

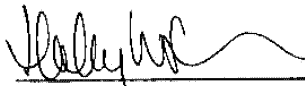
14 **2.12 Transfer of Assets for Medicaid Eligibility**

15 The Conservator is authorized to transfer the Individual's share in community assets to
16 his spouse, KATHRYN E. MORTEN. Per WAC 182-513-1355(10), the Conservator
17 should have "...until the end of the month of the first regularly scheduled eligibility review
18 to transfer countable resources in excess of \$2,000 to the community spouse".

19 **2.13 Reimbursement to Guardian/Conservator**

20 Kathryn Morten is authorized to reimburse the Guardian/Conservator in the amount of
21 \$91,121.40 for funds advanced for legal fees and the Individual's care.
22

23 Dated this 30th day of April, 2026.
24

25 
26 JUDGE Commissioner

ORDER APPROVING GUARDIAN AND
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 **ELDERLAW**
MEYERS, NEUBECK & HULFORD

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1 Presented By:

2 ELDER LAW OFFICES OF
3 MEYERS, NEUBECK & HULFORD, P.S.

4 
5 DAVID M. NEUBECK, WSBA #31321
6 SARA LC HULFORD, WSBA #52098
7 TODD L. SLIVA, WSBA #54298
8 Attorneys for Guardian/Conservator
9 LISA K. MORTEN
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ORDER APPROVING GUARDIAN AND
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