



e-FILING REPORT COVER SHEET

COMPANY NAME: Roats Water System, Inc.

DOES REPORT CONTAIN CONFIDENTIAL INFORMATION?  No  Yes If yes, submit a redacted public version (or a cover letter) by email. Submit the confidential information as directed in OAR 860-001-0070 or the terms of an applicable protective order.

Select report type:  RE (Electric)  RG (Gas)  RW (Water)  RT (Telecommunications)  RO (Other, for example, industry safety information)

Did you previously file a similar report?  No  Yes, report docket number:

Report is required by:  OAR 860-036-2360  Statute  Order

Note: A one-time submission required by an order is a compliance filing and not a report (file compliance in the applicable docket)

Other (For example, federal regulations, or requested by Staff)

Is this report associated with a specific docket/case?  No  Yes, docket number: RW 79

List Key Words for this report. We use these to improve search results.

Affiliated Interest Annual Report

Send the completed Cover Sheet and the Report in an email addressed to [PUC.FilingCenter@puc.oregon.gov](mailto:PUC.FilingCenter@puc.oregon.gov)

Send confidential information, voluminous reports, or energy utility Results of Operations Reports to PUC Filing Center, PO Box 1088, Salem, OR 97308-1088 or by delivery service to 201 High Street SE Suite 100, Salem, OR 97301.



# Affiliated Interest Annual Report for Water Utilities

OAR 860-036-2360

This form must be electronically filed with the OPUC at: [PUC.FilingCenter@puc.oregon.gov](mailto:PUC.FilingCenter@puc.oregon.gov) on or before June 1, of each year.

Utility Company Name: ROATS WATER SYSTEM, INC.
Address: 61147 HAMILTON LANE, BEND OR 97702
Telephone: 541 382-3029
Email: BILL@ROATSWATER.COM

## Annual Transactions for January 1 through December 31, of each year

(Please use this format and attach additional sheets if needed.)

Docket & Order No.*	Name of Affiliate And Description of Affiliation	Purpose of Transaction	Hours & Current Hourly Rate (If Applicable)	Annual Dollar Amount
UI326 13-066	WILLIAM K. ROATS	FACILITY RENTS		\$ [REDACTED]
UI273 07-395	WILLIAM K. ROATS	SALARY, HEALTH AND RETIREMENT BENEFITS		\$ [REDACTED]
UI467 22-122	SHIRLEY E. ROATS	SALARY, HEALTH AND RETIREMENT BENEFITS		\$ [REDACTED]
UI468 22-123	WILLIAM C. ROATS	SALARY, HEALTH AND RETIREMENT BENEFITS		\$ [REDACTED]
UI466 22-121	MICHELLE ROATS BERG	SALARY, HEALTH AND RETIREMENT BENEFITS		\$ [REDACTED]

\*If you do not know the docket or order number, please call and staff will help you with that information. Please do not file the form with this section blank; if not affiliated interest exists please use N/A.

Have any changes occurred to the utility, affiliate, or the affiliated relationships that affect any affiliated interest contracts?

- NO
- YES - Using a separate sheet, please explain the changes and provide any other pertinent information.

Signature of responsible party: /s/ William K Roats Date: 05/02/22

Printed name: William K Roats Position held in utility: President

Telephone Number: 541 382-3029 E-mail: @bill@roatswater.com

The Commission may request further information regarding any affiliated interest transaction.

If you have questions about the form call Russ Beitzel at (971) 209-0533 or email: [russell.beitzel@puc.oregon.gov](mailto:russell.beitzel@puc.oregon.gov)

ATTACHMENT

AFFILIATED INTEREST ANNUAL REPORT FOR WATER UTILITIES

REPORT FOR YEAR ENDED DECEMBER 31, 2021

EFFECTIVE APRIL 30, 2021 WILLIAM C ROATS (Casey) RESIGNED AS AN OFFICER AND EMPLOYEE OF ROATS WATER SYSTEM, INC. FROM THIS DATE FORWARD CASEY WILL NO LONGER BE ENTITLED TO ANY OF THE COMPENSATION COVERED BY THE AFFILIATED INTEREST AGREEMENT REFERRED TO AS DOCUMENT UI468 ORDER NO. 22-123.