DOUGLAS COUNTY, NV 2023-1000584

Rec:\$40.00 Total:\$40.00

09/19/2023 02:03 PM

LAW OFFICE OF KAREN L. WINTERS

Pgs=10

APN 1318-03-212-036

After Recording Mail to:

Jeffrey A. Jones 151 Surf Way, #5 Monterey, CA 93940

Mail Tax Statements To:

Same



SHAWNYNE GARREN, RECORDER

The undersigned affirms that this document does not contain the social security number of a person or persons. (NRS 239B.030).

# REVISED AFFIDAVIT OF INCAPACITY OF CO-TRUSTEE, AND CERTIFICATE OF THE ALLEN W. JONES and BONNIE J. JONES REVOCABLE LIVING TRUST

STATE OF NEVADA	)
	: SS.
COUNTY OF DOUGLAS	)

Jeffrey A. Jones, of Monterey, California, being first duly sworn, does hereby swear under penalties of perjury under the laws of the State of Nevada that the following statements are true:

- (1) By instrument dated September 5, 2008, Allen W. Jones and Bonnie J. Jones executed the Declaration of the Allen W. Jones and Bonnie J. Jones Revocable Living Trust ("Trust") as Grantors and Co-Trustees. The Trust was amended by a First Amendment to the Allen W. Jones and Bonnie J. Jones Revocable Living Trust dated September 24, 2013.
- (2) The Trust appointed Allen W. Jones and Bonnie J. Jones to serve as Co-Trustees of the Trust, with the remaining Grantor/Co-Trustee to serve as sole Trustee upon the death or incapacity of the other Co-Trustee.
- (3) The Trust appointed Jeffrey A. Jones to serve as Successor Trustee upon the death or incapacity of both Grantors/Co-Trustees.
- (4) Part 9 of the Trust provides that incapacity of a Grantor/Trustee may be established as follows:

"'Incapacity" of a Grantor shall be determined by the existence of one or more of the following:

- (1) There is a court order, which such Trustee or beneficiary deems to be jurisdictionally proper and still concurrently applicable, holding a person to be legally incapacitated to act on his or her own behalf or appointing a guardian to act for him or her, or
- (2) There are duly executed, witnessed and acknowledged written certificates of two licensed physicians (each of whom represents that he or she is certified by a recognized medical board), to the effect that each physician has examined the Grantor and has concluded that such person has become incapacitated to act

### rationally and prudently in his or her own financial best interests"

- (5) Bonnie J. Jones is, and at all relevant times has been, a resident of Nevada. Bonnie J. Jones's physician has executed a written certification, attesting to her incapacity, and a second physician has also executed a written certification attesting to Bonnie J. Jones's incapacity, and the undersigned Successor Trustee, who is also a beneficiary, also hereby certifies that Bonnie J. Jones has become substantially unable to manage her financial affairs or is no longer able to resist undue influence. The certifications are attached hereto as Exhibit A and incorporated herein.
- (6) Part 7, Paragraph F provides that any Trustee may resign by signing a notice of resignation and delivering it to the successor Trustee. Grantor/Co-Trustee Allen W. Jones has signed a notice of resignation, which is attached hereto as Exhibit B and incorporated herein. By the successor Trustee's signature herein, Jeffrey A. Jones acknowledges receipt of the notice of resignation.
- (7) Pursuant to the terms of the Trusts, Jeffrey A. Jones has assumed all the duties of Trustee.
- (8) Jeffrey A. Jones is authorized under the terms of the Trust and applicable provisions of Nevada Revised Statutes to act as the Trustee with respect to the Trust's interest in any property.
- (9) Jeffrey A. Jones is authorized under the terms of the Trust act as the Successor Trustee with respect to the Trust's interest in any property. The following real property is currently titled in the name of the Trust:

That certain real property situate in the County of Douglas, State of Nevada, described as follows:

Lot 151, as shown on the map of Skyland Subdivision No. 3, filed in the office of the County Recorder of Douglas County, Nevada, on February 24, 1960, as Document No. 15653.

Per NRS 111.312, the above description appeared previously in that certain document recorded on May 21, 2009 in Book 0509 at Page 5442 as Document No. 0743611.

- (10) Jeffrey A. Jones is authorized to act on behalf of the Trust, and is vested with the following powers concerning the management of the Trust property, in addition to the powers now or hereafter conferred under the laws of the State of Nevada:
  - (a) To continue to hold any property and to operate, at the risk of the Trust Estate, any business that the Trustee receives or acquires under the Trust as long as the Trustee deems advisable;
  - (b) To manage, control, grant options on, purchase, sell (for cash or deferred payments), convey, exchange, partition, divide, improve and repair Trust property.
  - (c) To lease Trust property for terms within or beyond the term of the Trust and for any purpose, including exploration for and removal of gas, oil and other minerals; and to enter into community oil leases, pooling and unitization agreements;
  - (d) To borrow money, and to encumber or hypothecate Trust property by mortgage, deed of trust, pledge or otherwise;
  - (e) To carry, at the expense of the Trust, insurance of such kinds and in amounts as the Trustee deems advisable to protect the Trust Estate and the Trustee

against any hazard;

- (f) To commence or defend such litigation with respect to the Trust or any property of the Trust Estate as the Trustee may deem advisable, at the expense of the Trust;
- (g) To compromise or otherwise adjust any claims or litigation against or in favor of the Trust;
- (h) To invest and reinvest the Trust Estate in every kind of property, real, personal or mixed, and every kind of investment, specifically including, but not by way of limitation, corporate obligations of any kind, stocks, preferred or common, shares or investment trusts, investment companies and mutual funds, and mortgage participations, which people of prudence, discretion and intelligence acquire for their own account and any common trust fund administered by Trustee.
- (i) With respect to securities held in Trust, to have all the rights, the powers and privilege of an owner, including, but not by way of limitation, the power to vote, give proxies and pay assessments; to participate in voting trusts, pooling agreements, foreclosures, reorganizations, consolidations, mergers, liquidations, sales and leases, and incident to such participation to deposit securities with and transfer title to any protective or other committee on such terms as the Trustee may deem advisable; and to exercise or sell stock subscription or conversion rights;
- (j) Trustee may postpone distribution of all or part of the Trust assets until Trustee has determined in the Trustee's discretion that all Trust liabilities and tax obligations are satisfied.
- (k) To employ any custodian, investment advisor, attorney, accountant or any other agents to assist Trustee in the adminsitration of this Trust and to rely on the advice given by these agents.
- (11) No other person has a right to the interest of the Trust in the described property...
- (12) For the purpose of inducing all persons, organizations, corporations and entities including but not limited to any bank, broker, custodian, insurer, lender, title company, transfer agent, taxing authority, governmental agency, or party to act in reliance upon this Certificate of Trust, Jeffrey A. Jones hereby represents, warrants and agrees that:
- (a) If the Trust is revoked or amended under any circumstances, Jeffrey A. Jones, his estate, heirs, successors and assigns will hold any person, organization, corporation or entity (hereinafter referred to collectively as "Person") harmless from any loss suffered, or liability incurred by such Person in acting in accordance with the instructions of the Trustee acting under the Trust Agreement or this Certificate of Trust prior to the receipt by such Person of actual notice of any such revocation or amendment.
- (b) The powers conferred on the Trustee by the Trust Agreement as set out in this Certificate of Trust may be exercised by the Trustee alone and the Trustee's signature or act under the authority granted in the Trust Agreement may be accepted by Persons as fully authorized by the undersigned Trustee and with the same force and effect as if she was personally present, competent and acting on her own behalf.

(c) No Person who acts in reliance upon this Certificate of Trust or any representations the Trustee may make as to the fact that the Trustee's powers are then in effect, the scope of the Trustee's authority granted under the Trust Agreement, the Trustors' competency at the time the Trust Agreement was executed, the fact that the Trust Agreement has not been revoked, or the fact that the Trustee continues to serve as Trustee, shall incur any liability to the undersigned, Jeffrey A. Jones's heirs or assigns for permitting the Trustee to exercise any such authority.

Dated this 18th day of September, 2023.

THE A TONES

#### **ACKNOWLEDGMENT**

STATE OF NEVADA

: ss.

COUNTY OF DOUGLAS

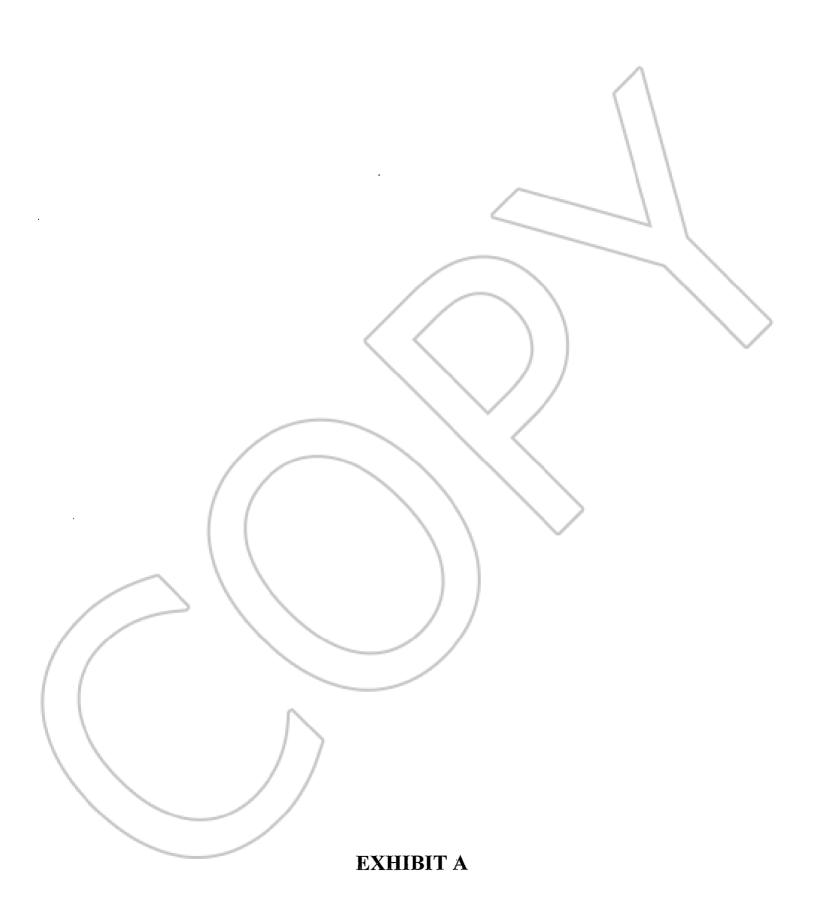
On September 18, 2023 before me, Renee J. Morris, Notary Public, personally appeared JEFFREY A. JONES, personally known to me (or proved to me on the basis of satisfactory evidence) to be the person whose name is subscribed to the within instrument and acknowledged to me that he executed the same in his authorized capacities, and that by his signature on the instrument the person, or the entity upon behalf of which the persons acted, executed the instrument.

WITNESS my hand and official seal.

Seal



NOTARY PUBLIC



Mark Canty MD, CMD, ABFP 1001 Mountain Street Carson City, NV, 89703

To whom it may concern,

Bonnie Jones, DOB 11/5/1942, is an active patient of mine at Carson Tahoe Transitional Rehab. She lacks the cognitive ability at this time to make informed decisions regarding her financial and personal needs and would benefit from assignment of a power of attorney or guardian.

Thank you for your attention to this matter,

MDC.A.

Mark Canty MD, CMD, ABFP



Joseph Heflin M.D. 14235 Eagle Springs Ct. Reno, NV 89511

Phone: 775-391-9778 Fax: 775-376-9470 License Number: 15218

## 11 August 2023

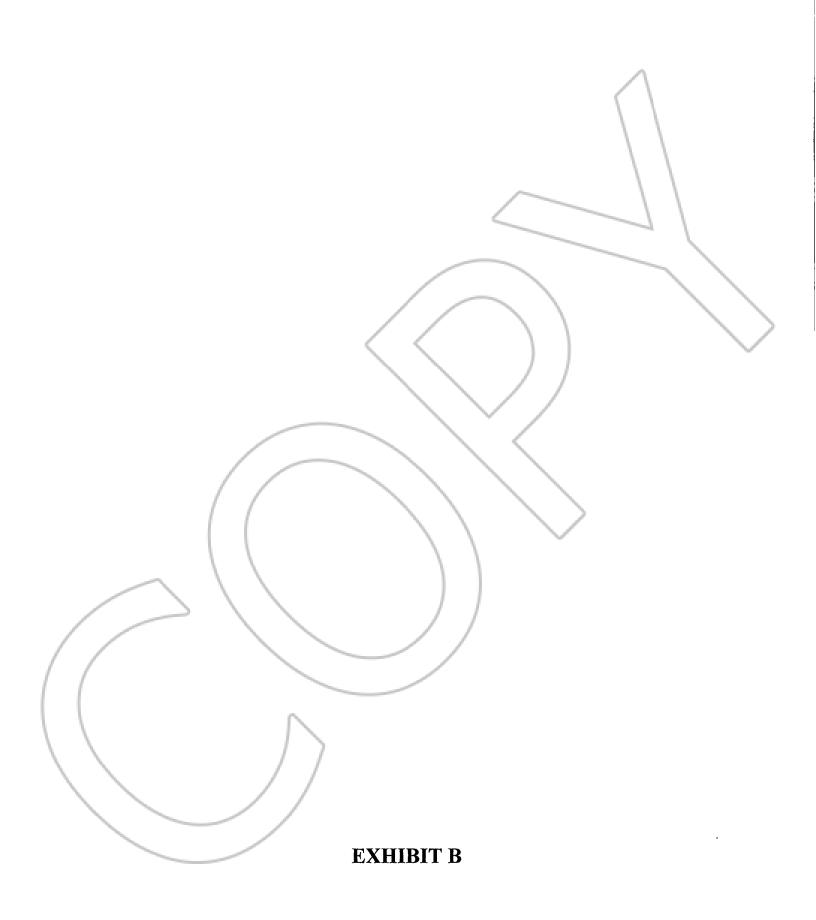
This is a letter of incapacitation for patient Bonnie Jones. This patient was diagnosed with dementia in 2006. She currently lives at Prestige, a skilled nursing facility in Carson City, NV. I examined her and reviewed her medical records on August 10<sup>th</sup>, 2023. The patient is profoundly demented. She could not tell me her date of birth, place of birth, and did not know today's date. She did not know where she lived nor the president's name. The only thing she could remember was her own name.

This patient is not capable of making financial decisions or handling financial affairs.

Sincerely,

Dr. Joseph Heflin

08/11/2023



# NOTICE OF RESIGNATION OF CO-TRUSTEE OF THE ALLEN W. JONES AND BONNIE J. JONES REVOCABLE LIVING TRUST

ALLEN W. JONES, as co-trustee of the ALLEN W. JONES AND BONNIE J. JONES REVOCABLE LIVING TRUST, dated September 5, 2008 ("Trust") states as follows:

WHEREAS, pursuant to Part 7, Paragraph F of the Trust, any trustee in office may resign at any time by signing a notice of resignation and delivering the notice of resignation to the successor Trustee;

NOW THEREFORE, ALLEN W. JONES, hereby resigns as trustee of the Trust, effective as of the date written below, and JEFFREY A. JONES is named as the successor trustee of the Trust to be effective as of the date of this notice and resignation of ALLEN W. JONES as trustee.

Dated: July 31, 2023

ALLEN W. JONES, individually and as Trustee of the Allen W. Jones and Bonnie J. Jones Revocable Living Trust, dated September 5, 2008

### ACKNOWLEDGMENT OF RECEIPT OF NOTICE OF RESIGNATION OF TRUSTEE

The undersigned Successor Trustee hereby acknowledges receipt of the foregoing notice of resignation.

Dated: July 31, 2023

Jeffrey A. Jones

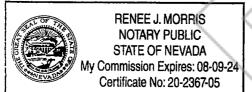
#### **ACKNOWLEDGMENT**

STATE OF NEVADA	)
	: ss.
COUNTY OF DOUGLAS	)

On July 31, 2023, before me, Reneé J. Morris, Notary Public, personally appeared ALLEN W. JONES and JEFFREY A. JONES, personally known to me (or proved to me on the basis of satisfactory evidence) to be the persons whose names are subscribed to the within instrument and acknowledged to me that they executed the same in their authorized capacities, and that by their signatures on the instrument the persons, or the entity upon behalf of which the persons acted, executed the instrument.

WITNESS my hand and official seal.

Seal



NOTARY CURLIC