

RECORDING REQUESTED BY AND  
WHEN RECORDED MAIL TO:

O'HARA & GRECO  
25361 Commercentre Drive, Suite 150  
Lake Forest, CA 92630  
Attn: Kevin O'Hara, Esq.



SHAWNYNE GARREN, RECORDER

### AFFIDAVIT OF SUCCESSOR TRUSTEE

The undersigned, being first duly sworn, says: that she has read the foregoing document, and knows the contents thereof, and the same is true of her own knowledge:

1. On February 11, 1993, JAMES D. DAVIS and SUSAN J. DAVIS, as Trustors and Trustees established THE DAVIS FAMILY TRUST (the "Trust"). Upon the death of JAMES D. DAVIS on November 16, 2006, the DAVIS FAMILY SURVIVOR'S TRUST (the "Survivor's Trust") was established under the terms of the Trust.

2. This Affidavit is a true and correct representation of the terms of the Survivor's Trust.

3. SUSAN J. DAVIS was named as the sole Trustee of the Survivor's Trust. Under the terms of the First Amendment to The Davis Family Trust dated February 11, 1993 (the "First Amendment), if SUSAN J. DAVIS becomes incompetent, then JANET LEE TURNER shall act as sole successor Trustee of the Survivor's Trust. Under the terms of the First Amendment, if JANET LEE TURNER declines to act as Trustee, then DAVID OLIVIERI shall act as sole Trustee of the Survivor's Trust.

4. As set forth in an Affidavit of Successor Trustee recorded in the office of the Recorder of Douglas County, State of Nevada, on February 2, 2021, as Document No. 2021-961202, upon the incompetence of SUSAN J. DAVIS and declination of JANET LEE TURNER to act as Trustee, DAVID OLIVIERI became the sole Trustee of the Survivor's Trust.

5. Two physicians have determined and certified that SUSAN J. DAVIS has the capacity to care for herself and her property as stated in a letter from Michael Hada, MD dated August 3, 2022 and a letter from Kamita Allen, MFT, PSYD dated June 5, 2022, copies of which are attached hereto. Upon SUSAN J. DAVIS regaining competency, SUSAN J. DAVIS became the Trustee of the Survivor's Trust in place of DAVID OLIVIERI.

6. Pursuant to the terms of the Trust, SUSAN J. DAVIS has assumed the responsibilities of sole Trustee of the Survivor's Trust.

7. The Survivor's Trust is not of record in any court of law and has not been recorded in the real property records of any county.

8. The Survivor's Trust has not been revoked, modified, or amended in any manner which would cause the representations contained herein to be incorrect.

9. SUSAN J. DAVIS is filing this Affidavit with the Douglas County, Nevada Recorder to establish her succession as the sole Trustee pursuant to the aforesaid Survivor's Trust and to enable her to administer and distribute real estate pursuant to the terms of the Survivor's Trust.

10. The Survivor's Trust estate includes an interest in real property in Douglas County, Nevada, described as follows: LOT 150, BLOCK C OF PLEASANTVIEW PHASE 8 MAP NO. 1000-9, ACCORDING TO THE MAP THEREOF, FILED IN THE OFFICE OF THE RECORDER OF DOUGLAS COUNTY, STATE OF NEVADA ON JUNE 30, 1999 IN BOOK 699, PAGE 6647, AS DOCUMENT NO. 471554; APN: 1220-17-613-011

11. Title holder of the foregoing real property was DAVID OLIVIERI, Trustee of The Davis Family Survivor's Trust Dated February 11, 1993, under an Affidavit of Successor Trustee signed by DAVID OLIVIERI and recorded as Document No. 2021-961202 on February 2, 2021 of Official Records of Douglas County, State of Nevada.

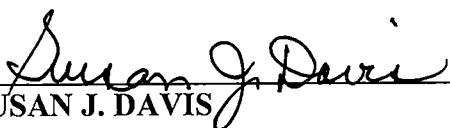
12. The successor title holder to the real property described above will be SUSAN J. DAVIS, Trustee of The Davis Family Survivor's Trust Dated February 11, 1993.

13. SUSAN J. DAVIS is authorized under the terms of the Survivor's Trust and the provisions of the California Probate Code to act as the Trustee with respect to the Survivor's Trust's interest in the real property described above.

14. No other person has a right to the interest of the Survivor's Trust in the real property described above.

15. The real property described above shall be transferred to SUSAN J. DAVIS, Trustee of The Davis Family Survivor's Trust Dated February 11, 1993.

Executed at Lake Forest, on February 17, 2023.


  
SUSAN J. DAVIS

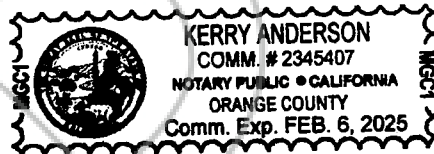
A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document

STATE OF CALIFORNIA    )  
  ) ss.  
COUNTY OF ORANGE    )

Subscribed and sworn to (or affirmed) before me on this 17th day of February, 2023, by  
SUSAN J. DAVIS, proved to me on the basis of satisfactory evidence to be the person who  
appeared before me.

WITNESS my hand and official seal.

  
\_\_\_\_\_  
Signature of Notary Public





**PEACE OF MIND**  
PSYCHOLOGICAL SERVICES

**Dr. Kanita Allen, LMFT, PsyD**  
**26895 Aliso Creek Rd. Ste B-1013**  
**Aliso Viejo, CA 92656**

**Phone: (949) 630-0584      Fax: (949) 630-0587**

---

---

June 5th, 2022

Patient: Susan Davis  
DOB: 03/14/1942

Examiner: Kanita Allen, LMFT, Psy.D.  
Date(s) of Service: 10/01/2021, 6/1/2022

To Whom It May Concern:

In my professional opinion, Susan Davis, discussed herein is capable of making informed decisions regarding her health and finances. My assessments do not indicate evidence of cognitive deficits that cause significant impairment in social functioning and ADLs. Ms. Davis was seen and fully assessed on both 10/01/21 and 6/1/22 and continues to be under my care as needed.

At the time of my assessment, Susan Davis has capacity and her current cognitive status renders her able to manage substantially her own financial resources, resist fraud, or undue influence. I am a Doctor of Psychology and Licensed Psychologist in the state of California. I declare under penalty of perjury, under the laws of the State of California, that the foregoing is true and correct to the best of my knowledge. If you have any further questions regarding this assessment, please call or fax at the above numbers.

Sincerely,

Kanita Allen, MFT, PsyD  
PSY 26567

**hoag**

at Home

HOAG AT HOME PHYSICIANS - NEWPORT BEACH  
4041 MACARTHUR BOULEVARD SUITE 400  
OFFICE 04W120  
NEWPORT BEACH CA 92660-2510  
949-736-6102  
Dept Fax: 949-736-6197

August 3, 2022

Susan Davis  
The Orchards Health Center  
1 Amistad Drive  
Ladera Ranch CA 92694  
DOB 3/14/1942

To Whom it may concern,

I am the primary care physician of Susan Davis. I am licensed to practice medicine in the state of California, and I am not related by blood or marriage to Susan Davis.

As the primary care physician of Susan Davis, it is my medical opinion that she is able to make healthcare and financial decisions in her own best interest.

If you have any questions, please feel free to call me at my office at (949) 736-6102

Best Regards,

Michael Haga, MD

