

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.



00165150202309940810050057

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 CREDIT SHELTER TRUST UNDER THE DAVIS FAMILY (the "Credit Shelter Trust") was established under the terms of the Trust.

2. This Affidavit is a true and correct representation of the terms of the Credit Shelter Trust.

3. SUSAN J. DAVIS was named as the sole Trustee of the Credit Shelter 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 Credit Shelter 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 Credit Shelter 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. 2021-961201, 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 Credit Shelter Trust.

5. Two physicians have determined and have certified that SUSAN J. DAVIS has the capacity to care for herself and her property as stated in a letter from Michael Haga, 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 Credit Shelter 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 Credit Shelter Trust.

7. The Credit Shelter 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 The Credit Shelter Trust has not been revoked, modified, or amended in any manner which would cause the representations contained herein to be incorrect.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 Credit Shelter Trust and to enable her to administer and distribute real estate pursuant to the terms of the Credit Shelter Trust.

10. The Credit Shelter Trust estate includes an interest in a real property in Douglas County, Nevada, described as follows:

Lot 14, as shown on the Final Subdivision Map PD# 01-21 for COTTAGES in MOUNTAIN GLEN, filed for record in the office of the County Recorder of Douglas County, State of Nevada, on August 9, 2002, in Book 802, Page 2902, as File No. 549206. Parcel #1320-30-820-016.  
Address: 1046 Aspen Grove Circle, Minden, Nevada

11. Title holder of the foregoing real property was DAVID OLIVIERI, Trustee of The Credit Shelter Trust created under the Davis Family Trust dated February 11, 1993, under an Affidavit of Successor Trustee signed by DAVID OLIVIERI and recorded as Document No. 2021-961201 on February 2, 2021 of Official Records of Douglas County, State of Nevada.

12. The Credit Shelter Trust estate includes an interest in a real property in Douglas County, Nevada, described as follows:

Lot 6, Block E, as set forth on that subdivision map entitled SUNRIDGE UNIT NO. 1-A. recorded April 15, 1988, in Book 488, Page 1638, as Document No. 176220, Official Records of Douglas County, Nevada, Parcel #1420-07-711-003.  
Address: 995 Shadow Lane, Minden, Nevada.

13. Title holder of the foregoing real property was DAVID OLIVIERI, Trustee of The Credit Shelter Trust created under the Davis Family Trust dated February 11, 1993, under an Affidavit of Successor Trustee signed by DAVID OLIVIERI and recorded as Document No. 2021-961201 on February 2, 2021 of Official Records of Douglas County, State of Nevada.

14. The successor title holder to the two (2) real properties described above will be SUSAN J. DAVIS, Trustee of The Credit Shelter Trust created under the Davis Family Trust Dated February 11, 1993.





**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**

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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

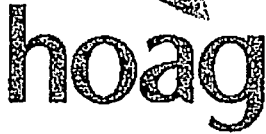
**To Whom It May Concern:**

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



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

A handwritten signature in black ink, appearing to read "MHaga", written over a large, faint watermark that says "DRAFT".