

CLERK OF THE COURT

Electronically Filed  
Aug 04 2015 02:30 p.m.  
Tracie K. Lindeman  
Clerk of Supreme Court

HARRIET H. ROLAND, ESQ.  
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Facsimile: (702) 259-1116  
*Attorneys for Christopher D. Davis*

**EIGHTH JUDICIAL DISTRICT COURT**  
**CLARK COUNTY, NEVADA**

In the matter of:

Case No.: P-15-083867-T

The BEATRICE B. DAVIS FAMILY HERITAGE  
TRUST, dated July 28, 2000, as amended on  
February 24, 2014.

Dept. No.: 26

**NOTICE OF APPEAL**

Notice is hereby given that CHRISTOPHER D. DAVIS hereby appeals to the  
SUPREME COURT OF NEVADA from the Order instructing or appointing a trustee filed in  
this action on June 24, 2015. Notice of Entry of Such Order was entered on July 1, 2015 and

///

///

///

///

1 served thereafter by U.S. Mail.

2  
3  
4 Anthony L. Barney, Esq.  
5 Nevada Bar No. 8366  
6 ANTHONY L. BARNEY, LTD.  
7 3317 W. Charleston Blvd., Suite B  
8 Las Vegas, NV 89102  
9 *Attorneys for Christopher D. Davis*

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HARRIET H. ROLAND, ESQ.  
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Henderson, NV 89074  
*Attorneys for Christopher D. Davis*

CERTIFICATE OF SERVICE

I hereby certify that I am an employee of Anthony L. Barney, Ltd. and not a party to this action. I further certify that on the 30<sup>th</sup> day of July, 2015, I served a copy of the foregoing Notice of Appeal upon each of the parties via Odyssey E-Filing System pursuant to NRC 5(b)(2)(D) and E.D.C.R. 8.05. I further certify that on the 30<sup>th</sup> day of July, 2015, I served the foregoing Notice of Appeal by first class US mail, postage prepaid, upon the following persons or entities:

Tarja Davis  
3005 North Beverly Glen Circle  
Los Angeles, California 90077

Christopher Davis  
514 West 26<sup>th</sup> Street, #3E  
Kansas City, Missouri 64108

Winfield Davis  
Sky Line Terrace Apts.  
930 Figueroa Terr., Apt 529  
Los Angeles CA 90012-3072

Ace Davis  
C/o natural guardian Winfield Davis  
Sky Line Terrace Apts.  
930 Figueroa Terr., Apt 529  
Los Angeles CA 90012-3072

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Las Vegas, NV 89102-1835  
[office@anthonybarney.com](mailto:office@anthonybarney.com)  
Attorneys for Christopher Davis

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Solomon Dwiggin & Freer, Ltd.  
9060 West Cheyenne Avenue  
Las Vegas, NV 89129

1 msolomon@sdfnlaw.com

2 jhood@sdfnlaw.com

3 Attorneys for Caroline Davis

4 CHARLENE RENWICK, ESQ.

5 LEE HERNANDEZ LANDRUM & GAROFALO

6 7575 Vegas Drive #150

7 Las Vegas, Nevada 89128

8 Crenwick@lee-lawfirm.com

9 Attorneys for Dunham Trust Company

10 JONATHAN W. BARLOW, ESQ.

11 CLEAR COUNSEL LAW GROUP

12 50 Stephanie Street, Suite 101

13 Henderson, Nevada 89012

14 Jonathan@clearcounsel.com

15 Attorneys for Stephen K. Lenhardt

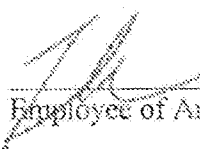
16 FHT Holdings LLC, A Nevada Limited Liability Company, Respondent

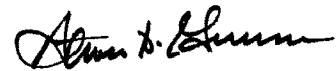
17 Registered Agent Solutions, Inc.

18 Registered Agent for FHT Holdings, LLC, a Nevada Limited Liability Company

19 4625 West Nevso Drive, Suite 2

20 Las Vegas, Nevada 89103

21  
22  
23  
24  
25  
26  
27  
28  
  
Employee of Anthony L. Barney, Ltd.



CLERK OF THE COURT

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*Attorneys for Christopher D. Davis*

**EIGHTH JUDICIAL DISTRICT COURT**  
**CLARK COUNTY, NEVADA**

In the matter of:

Case No.: P-15-083867-T

The BEATRICE B. DAVIS FAMILY HERITAGE  
TRUST, dated July 28, 2000, as amended on  
February 24, 2014.

Dept. No.: 26

**CASE APPEAL STATEMENT**

CHRISTOPHER D. DAVIS ("Christopher"), by and through his attorneys HARRIET H. ROLAND, ESQ., of the ROLAND LAW FIRM and ANTHONY L. BARNEY, ESQ., of the law office of ANTHONY L. BARNEY, LTD., hereby submits his Case Appeal Statement for

1 his appeal from the Order filed on June 24, 2015, and entered on July 1, 2015, and served  
2 thereafter by U.S. mail in the above-mentioned matter and states as follows:

3 1. **Name of appellant filing this case appeal statement:** Christopher D. Davis, Beneficiary  
4 of the Beatrice B. Davis Family Heritage Trust dated July 28, 2000 (hereinafter "Trust").

5  
6 2. **Identify the judge issuing the decision, judgment, or order appealed from:** Honorable  
7 Judge Gloria Sturman of the Eighth Judicial District Court in Clark County, Nevada, issued the  
8 June 24, 2015 Order from which this appeal is taken.

9 3. **Identify each appellant and the name and address of counsel for each appellant:**

10  
11 A. Christopher D. Davis, Appellant

12 Harriett Roland, Esq.  
13 **ROLAND LAW FIRM**  
14 2740 E. St. Rose Pkwy., Suite 105  
Henderson, NV 89074  
*Attorney for Appellant, Christopher D. Davis*

15  
16 Anthony L. Barney, Esq.  
**ANTHONY L. BARNEY, LTD.**  
17 3317 W. Charleston Blvd., Suite B  
Las Vegas, NV 89102  
*Attorney for Appellant, Christopher D. Davis*

18  
19 4. **Identify each respondent and the name and address of appellate counsel, if known, for**  
20 **each respondent (if the name of a respondent's appellate counsel is unknown, indicate as**  
21 **much and provide the name and address of that respondent's trial counsel):**

22  
23 Appellate Counsel is unknown but Trial Counsel for Respondents are as follows:

24 A. Caroline Davis, Respondent

25 Mark Solomon, Esq.  
26 Joshua Hood, Esq.  
**SOLOMON DWIGGINS & FREER, LTD.**  
27 9060 W. Cheyenne Ave.  
Las Vegas, NV 89129  
28 *Attorney for Respondent Caroline Davis*

1  
2 B. Dunham Trust Company, Respondent

3 Charlene Renwick, Esq.  
4 **Lee Hernandez Landrum & Garofalo**  
5 7575 Vegas Drive #150  
6 Las Vegas, Nevada 89128  
7 *Attorney for Respondent Dunham Trust Company*

8  
9 C. Stephen K. Lehnardt, Respondent

10 Jonathan Barlow, Esq.  
11 **Clear Counsel Law Group**  
12 50 S. Stephanie St. #101  
13 Henderson, Nevada 89012  
14 *Attorney for Respondent Stephen K Lehnardt*

15 D. Tarja Davis, Respondent

16 Tarja Davis  
17 3005 North Beverly Glen Circle  
18 Las Angeles, California 90077

19 E. Winfield B. Davis, Respondent

20 Winfield B. Davis  
21 366-6 Habu Aridagawa Arida  
22 Wakayama 643-0025  
23 JAPAN

24 F. Ace Davis, Respondent

25 Ace Davis  
26 c/o Winfield B. Davis  
27 366-6 Habu Aridagawa Arida  
28 Wakayama 643-0025  
JAPAN

G. FHT Holdings LLC, A Nevada Limited Liability Company, Respondent

Registered Agent Solutions, Inc.  
Registered Agent for FHT Holdings, LLC, a Nevada Limited Liability Company  
4625 West Nevso Drive, Suite 2  
Las Vegas, Nevada 89103

1 5. Indicate whether any attorney identified above in response to question 3 or 4 is not  
2 licensed to practice law in Nevada and, if so, whether the district court granted that  
3 attorney permission to appear under SCR 42 (attach a copy of any district court order  
4 granting such permission): All attorneys are licensed to practice law in Nevada.

5  
6 6. Indicate whether appellant was represented by appointed or retained counsel in the  
7 district court: Appellant was represented by retained counsel in district court.

8 7. Indicate whether appellant is represented by appointed or retained counsel on appeal:  
9 Appellant is represented by retained counsel on appeal.

10  
11 8. Indicate whether appellant was granted leave to proceed in forma pauperis, and the  
12 date of entry of the district court order granting such leave: Appellant was not granted  
13 leave to proceed in forma pauperis.

14 9. Indicate the date the proceedings commenced in the district court (e.g., date  
15 complaint, indictment, information, or petition was filed): The Petition to Assume  
16 Jurisdiction of Trust was filed on February 10, 2015.

17  
18 10. Provide a brief description of the nature of the action and result in the district court,  
19 including the type of judgment or order being appealed and the relief granted by the  
20 district court: This action arose with Respondent Caroline Davis requesting the district court  
21 to take jurisdiction over the Beatrice B. Davis Family Heritage Trust dated July 28, 2000  
22 ("Trust"), as purportedly amended on February 24, 2014, for an order to confirm appointment of  
23 Dunham Trust Company (a Nevada Trustee) as directed Trustee and to take jurisdiction over  
24 Christopher D. Davis as an investment advisor and as manager of FHT Holdings, LLC, a  
25 Nevada Limited Liability Company, and confirm appointment of Stephen K. Lehnardt as  
26 Distribution Trust Advisor.  
27  
28



1 A motion to dismiss was filed by Appellant Christopher D. Davis citing the court's lack of  
2 jurisdiction over the Trust, because the Trust situs and indispensable parties reside in Alaska,  
3 and there is insufficient basis to assert jurisdiction for purposes of confirming the appointment  
4 of any Nevada Trustee, Investment Advisor, or Distribution Trust Advisor for the Trust. The  
5 district court took jurisdiction over the Trust under a remedial theory of "constructive trust" and  
6 issued its confirmation of the appointment of Dunham Trust Company as trustee of the Trust in  
7 its June 24, 2015 Order (See Order attached as Exhibit A). The district court also incorrectly  
8 assumed jurisdiction over Christopher D. Davis in both his purported role as investment advisor  
9 of the Trust and as manager of FHT Holdings LLC without proper due service of process. The  
10 district court also granted the immediate disclosure of documents and information from  
11 Christopher D. Davis as to all information in his possession, custody, or control in his role as  
12 investment trust advisor, and in his role as manager of F.H.T. Holdings, LLC, which Appellant  
13 believes is improper when jurisdiction is absent. This Order is an appealable order pursuant to  
14 NRS 155.190(h).  
15  
16  
17

18 **11. Indicate whether the case has previously been the subject of an appeal to or original**  
19 **writ proceeding in the Supreme Court and, if so, the caption and Supreme Court docket**  
20 **number of the prior proceeding:** This case has not previously been the subject of an appeal or  
21 original writ proceeding.  
22

23 **12. Indicate whether this appeal involves child custody or visitation:** This case does not  
24 involve child custody or visitation.

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26 ///


27 ///

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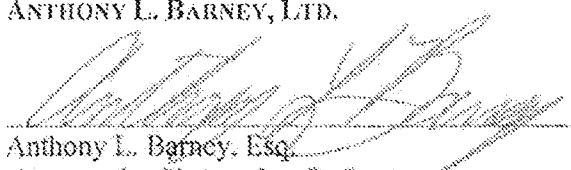
1 13. If this is a civil case, indicate whether this appeal involves the possibility of  
2 settlement: This appeal does involve the possibility of settlement.

3 DATED this 30<sup>th</sup> day of July, 2015.  
4

5 Respectfully Submitted,  
6 ROLAND LAW FIRM

7   
8 Harriet H. Roland, Esq.  
9 Attorney for Christopher D. Davis

10 ANTHONY L. BARNEY, LTD.

11   
12 Anthony L. Barney, Esq.  
13 Attorney for Christopher D. Davis

14 [Remainder of Page Intentionally Left Blank]  
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1 CERTIFICATE OF SERVICE

2 I hereby certify that I am an employee of Anthony L. Barney, Ltd. and not a  
3 party to this action. I further certify that on the 30<sup>th</sup> day of July, 2015, I served a copy of the  
4 foregoing Case Appeal Statement upon each of the parties via Odyssey E-Filing System  
5 pursuant to NRCP 5(b)(2)(D) and E.D.C.R. 8.05. I further certify that on the 30<sup>th</sup> day of July,  
6 2015, I served the foregoing Case Appeal Statement by first class US mail, postage prepaid,  
7 upon the following persons or entities:  
8

9 Tarja Davis  
10 3005 North Beverly Glen Circle  
11 Los Angeles, California 90077

12 Christopher Davis  
13 514 West 26<sup>th</sup> Street, #3E  
14 Kansas City, Missouri 64108

15 Winfield Davis  
16 Sky Line Terrace Apts.  
17 930 Figueroa Terr., Apt 529  
18 Los Angeles CA 90012-3072

19 Ace Davis  
20 C/o natural guardian Winfield Davis  
21 Sky Line Terrace Apts.  
22 930 Figueroa Terr., Apt 529  
23 Los Angeles CA 90012-3072

24 ANTHONY L. BARNEY, ESQ.  
25 ANTHONY L. BARNEY, LTD.  
26 3317 W. Charleston Boulevard, Suite B  
27 Las Vegas, NV 89102-1835  
28 [office@anthonybarney.com](mailto:office@anthonybarney.com)  
Attorneys for Christopher Davis


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3 [jhood@sdfnvlaw.com](mailto:jhood@sdfnvlaw.com)  
4 Attorneys for Caroline Davis

5 CHARLENE RENWICK, ESQ.  
6 LEE HERNANDEZ LANDRUM & GAROFALO  
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8 Las Vegas, Nevada 89128  
9 [Crenwick@lee-lawfirm.com](mailto:Crenwick@lee-lawfirm.com)  
10 Attorneys for Dunham Trust Company

11 JONATHAN W. BARLOW, ESQ.  
12 CLEAR COUNSEL LAW GROUP  
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14 Henderson, Nevada 89012  
15 [Jonathan@clearcounsel.com](mailto:Jonathan@clearcounsel.com)  
16 Attorneys for Stephen K. Lenhardt

17 FHT Holdings LLC. A Nevada Limited Liability Company, Respondent  
18 Registered Agent Solutions, Inc.  
19 Registered Agent for FHT Holdings, LLC, a Nevada Limited Liability Company  
20 4625 West Nevso Drive, Suite 2  
21 Las Vegas, Nevada 89103

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Employee of Anthony L. Barney, Ltd.

# **EXHIBIT A**

  
CLERK OF THE COURT

NOTICE

HARRIET H. ROLAND, ESQ.  
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Email: hroland@rolandlawfirm.com  
Attorney for Christopher D. Davis

DISTRICT COURT  
CLARK COUNTY, NEVADA

In the Matter of  
  
The BEATRICE B. DAVIS FAMILY  
HERITAGE TRUST, dated July 28, 2000, as  
amended on February 24, 2014.


Case No.: P-15-083867  
Dept. No.: Probate (26)


NOTICE OF ENTRY OF ORDER

YOU AND EACH OF YOU WILL PLEASE TAKE NOTICE that the *Order* was entered  
by the Court on June 24, 2015 in the above-entitled matter, a copy of which is attached hereto.

DATED this 1<sup>st</sup> day of July, 2015.

ROLAND LAW FIRM

  
HARRIET H. ROLAND, ESQ.  
Nevada Bar No. 5471  
Attorney for Christopher D. Davis



CLERK OF THE COURT

HARRIET H. ROLAND, ESQ.  
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Facsimile: (702) 259-1116  
*Attorneys for Christopher D. Davis*

**EIGHTH JUDICIAL DISTRICT COURT  
CLARK COUNTY, NEVADA**

In the matter of:

The BEATRICE B. DAVIS FAMILY HERITAGE  
TRUST, dated July 28, 2000, as amended on  
February 24, 2014.

Case No.: P-15-083867-T

Dept. No.: 26

Hearing Date: April 22, 2015

Hearing Time: 9:00 a.m.

**ORDER**

This matter came before the Court for hearing on the 22<sup>nd</sup> day of April, 2015 at 9:00 a.m., upon the Christopher D. Davis's Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19 and Caroline Davis's Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution

1 Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate  
2 Disclosure of Documents and Information from Christopher D. Davis. Christopher D. Davis  
3 was represented by Harriet Roland, Esq. of the Roland Law Firm and Anthony L. Barney, Esq.,  
4 of the law office of Anthony L. Barney, Ltd., Caroline Davis was represented by Mark  
5 Solomon, Esq., of the law firm of Solomon Dwiggin and Freer, Ltd.; Stephen K. Lehnardt was  
6 represented by Jonathan W. Barlow, Esq. of the law office of Clear Counsel Law Group; and  
7 Dunham Trust Company was represented by Charlene N. Renwick, Esq., of the law office of  
8 Lee Hernandez Landrum & Garofalo. After reviewing the pleadings on file and in the court  
9 record, hearing oral arguments by both parties in this matter, being fully advised in the  
10 premises, and for good cause appearing, the Court hereby finds and orders the following:

13 IT IS FOUND that since the first amendment, Christopher has been directing the trust in  
14 Nevada, and that everyone involved relied on this amendment as being proper.

16 IT IS FURTHER FOUND that the Court has no affidavit that another beneficiary existed  
17 at the time the first amendment was signed.

18 IT IS FURTHER FOUND that the Court has jurisdiction as a constructive trust because  
19 action on behalf of the trust has been taken in Nevada.

20 IT IS SO FOUND.

22 WHEREFORE, IT IS HEREBY ORDERED, ADJUDGED AND DECREED that the  
23 Petition to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor is  
24 granted without prejudice.

25 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
26 Assume Jurisdiction over Stephen K. Lehnardt as Distribution Trust Advisor is denied until a  
27 more definite statement is filed.  
28



1 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
2 Confirm Dunham Trust Company as Directed Trustee is granted.

3 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition for  
4 Immediate Disclosure of Documents and Information from Christopher D. Davis is granted as to  
5 all information in his possession <sup>custody or control</sup> in his role as Investment Trust Advisor, and on his  
6 role as manager of FHY Holdings

7 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that Christopher D.  
8 Davis's Motion to Dismiss is denied.

9 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that upon agreement of  
10 all parties, this Court will retain jurisdiction and all matters will be heard by the probate judge.


11 IT IS SO ORDERED, ADJUDGED AND DECREED.


12 DATED this 19<sup>th</sup> day of May, 2015.

13  
14  
15  
16   
DISTRICT COURT JUDGE

17  
18 Respectfully Submitted by the Following:

Approved as to Form and Content:

19  
20   
21 HARRIET H. ROLAND, ESQ.  
22 NV Bar No. 5471  
23 ROLAND LAW FIRM  
24 2470 E. St. Rose Pkwy, Ste. 105  
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28 Attorney for Christopher D. Davis

  
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Facsimile: (702) 924-0709  
Attorney for Stephen K. Lehnardt

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Approved as to Form and Content:



ANTHONY L. BARNEY, ESQ.  
Nevada Bar No. 8366  
TIFFANY S. BARNEY, ESQ.  
Nevada Bar No. 9754  
ANTHONY L. BARNEY, LTD.  
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*Attorneys for Dunham Trust Company*

Approved as to Form and Content:

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Facsimile: (702) 853-5485  
*Attorneys for Caroline D. Davis*

# REGISTER OF ACTIONS

CASE NO. P-15-083867-T

the Matter of the Trust of: The Beatrice Davis Heritage Trust

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\$  
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Case Type: Probate -  
Trust/Conservatorships  
Subtype: Individual Trustee  
Date Filed: 02/11/2015  
Location:  
Cross-Reference Case Number: P083867

## PARTY INFORMATION

Petitioner	Davis, Caroline 2501 Nob Hill PL N Seattle, WA 98109	Female	Lead Attorneys Mark Alan Solomon Retained 7028535483(W)
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Trust The Beatrice Davis Heritage Trust

## EVENTS & ORDERS OF THE COURT

### OTHER EVENTS AND HEARINGS

- 1/10/2015 Petition to Assume Jurisdiction of Trust  
*Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D Davis As Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D Davis*
- 1/10/2015 Notice of Hearing  
*Notice of Hearing on Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*
- 1/20/2015 Notice of Hearing  
*Amended Notice of Hearing on Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*
- 1/04/2015 Motion to Dismiss  
*Christopher D. Davis' Motion To Dismiss Pursuant To NRCP (12)(b) And NRCP 19*
- 1/05/2015 Errata  
*Errata to Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19*
- 1/05/2015 Notice of Hearing  
*Second Amended Notice of Hearing on Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher David As Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information From Christopher D. Davis*
- 1/06/2015 Petition - HM (9:30 AM) (Magistrate Yamashita, Wesley)  
*Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*  
Minutes  
*02/27/2015 Reset by Court to 03/06/2015*  
Result: Off Calendar
- 1/06/2015 Notice of Appearance  
*Notice of Appearance*
- 1/23/2015 Notice of Motion  
*Notice of Motion on Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19*
- 1/24/2015 Certificate of Service  
*Amended Certificate of Service*
- 1/08/2015 Certificate of Service  
*Supplemental Certificate of Mailing Of: Second Amended Notice of hearing on Petition to Assume Jurisdiction over the Beatrice Davis Family Heritage Trust, Dated July 28, 2000 as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*
- 1/13/2015 Opposition to Motion to Dismiss

1/16/2015 **Opposition**  
 Opposition to Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis, and Limited Joinder to Christopher D. Davis's Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19

1/16/2015 **Notice**  
 Notice of Appearance

1/20/2015 **Reply**  
 Reply to Opposition to Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis and Limited Joinder to Christopher D. Davis's Motion to Dismiss Pursuant to NRCP12(b) and NRCP 19

1/20/2015 **Reply**  
 Christopher D. Davis' Reply to Caroline Davis' Opposition to his Motion to Dismiss Pursuant to NRCP (12)(b) and NRCP 19

1/22/2015 **Petition** (9:00 AM) (Judicial Officer Sturman, Gloria)  
 Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014 Assume Jurisdiction Over Christopher David As Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Conf. Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information From Christopher D. Davis  
 Result: Granted in Part

1/22/2015 **Motion to Dismiss** (9:00 AM) (Judicial Officer Sturman, Gloria)  
 Motion on Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19  
 Result: Denied

1/22/2015 **All Pending Motions** (9:00 AM) (Judicial Officer Sturman, Gloria)  
Parties Present  
Minutes  
 Result: Matter Heard

1/28/2015 **Recorders Transcript of Hearing**  
 Transcript of Proceedings Motion to Dismiss: Motion on Christopher Davis' Motion to Dismiss Pursuant to NRCP 12(B) and NRCP 19; Pet. to Assume Jurisdiction over the Beatrice B. Davis Family Trust, Assume Jurisdiction over Christopher David as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate Disclosure of Documents and Information from Christopher D. Davis April 22, 2015

1/24/2015 **Order**  
 Order

1/01/2015 **Notice of Entry of Order**  
 Notice of Entry of Order

1/13/2015 **Certificate of Mailing**  
 Certificate of Mailing

1/14/2015 **Certificate of Mailing**  
 Supplement to Certificate of Mailing

1/14/2015 **Petition**  
 Notice of Petition and Petition for Reconsideration of the Order Dated May 19, 2015 Re: Petition to Assume Jurisdiction over the Beatrice Davis Family Heritage Trust Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D Davis as Investment Trust Advisor, Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate Disclosure of Documents and Information from Christopher D Davis

1/14/2015 **Notice**  
 Notice of petition and petition for reconsideration of the order dated may 19, 2015 re: petition to assume jurisdiction over the Beatrice B. Davis family heritage trust dated July 28, 2000, as amended on February 24, 2014, to assume jurisdiction over Christopher D. Davis as investment trust advisor, Stephen K. Lehnardt as distribution trust advisor, to confirm Dunham Trust Company as directed trustee, and for immediate disclosure of documents and information from Christopher D. Davis;

1/16/2015 **Certificate of Mailing**  
 Certificate Of Mailing

1/23/2015 **Certificate of Mailing**  
 Certificate of Mailing

1/23/2015 **Ex Parte Application**  
 Ex Parte Application for Order Shortening Time on Christopher Davis' Petition to Reconsider Order to Assume Jurisdiction, or in the alternative Petition to Stay the Court's Order Assuming Jurisdiction over Christopher Davis Dated May 19, 2015

1/28/2015 **Declaration**  
 Declaration of Taria Davis

1/29/2015 **Response**  
 Response to Petition for Reconsideration

1/19/2015 **Petition** (9:00 AM) (Judicial Officer Sturman, Gloria)  
 Notice of Petition and Petition for Reconsideration of the Order Dated May 19, 2015 Re: Petition to Assume Jurisdiction over the Beatrice Davis Family Heritage Trust Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D Davis as Investment Trust Advisor, Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate Disclosure of Documents and Information from Christopher D Davis

1 HARRIET H. ROLAND, ESQ.

2 Nevada Bar No. 5471

3 **ROLAND LAW FIRM**

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5 Henderson, NV 89074

6 Telephone: (702) 452-1500

7 Facsimile: (702) 920-8903

8 hroland@rolandlawfirm.com

Electronically Filed  
07/30/2015 03:48:50 PM

9 ANTHONY L. BARNEY, ESQ.

10 Nevada Bar No. 8366

11 TIFFANY S. BARNEY, ESQ.

12 Nevada Bar No. 9754

13 **ANTHONY L. BARNEY, LTD.**

14 3317 W. Charleston Blvd., Suite B

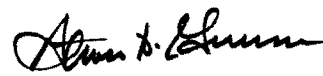
15 Las Vegas, NV 89102

16 Telephone: (702) 438-7878

17 Facsimile: (702) 259-1116

18 office@anthonybarney.com

19 *Attorneys for Christopher D. Davis*



CLERK OF THE COURT

20 **EIGHTH JUDICIAL DISTRICT COURT**

21 **CLARK COUNTY, NEVADA**

22 In the matter of:

Case No.: P-15-083867-T

23 The BEATRICE B. DAVIS FAMILY HERITAGE  
24 TRUST, dated July 28, 2000, as amended on  
25 February 24, 2014.

Dept. No.: 26

26 **NOTICE OF POSTING COST BOND**

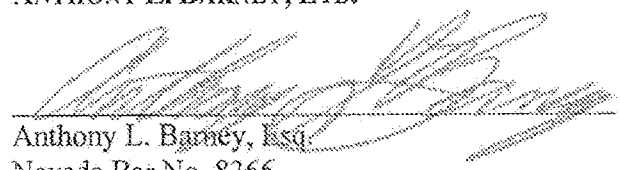
27 TO ALL PARTIES AND THEIR ATTORNEYS OF RECORD:

28 PLEASE TAKE NOTICE that concurrently with the filing of the Notice of Appeal and  
Case Appeal Statement, Christopher D. Davis, by and through his attorneys HARRIET H.  
ROLAND, ESQ., of the ROLAND LAW FIRM and ANTHONY L. BARNEY, ESQ., of the

1 law office of ANTHONY L. BARNEY, LTD., is posting Five Hundred Dollars (\$500) pursuant  
2 to N.R.A.P. 7.

3 DATED this 30<sup>th</sup> day of July, 2015.

4 ANTHONY L. BARNEY, LTD.

5  
6   
7 Anthony L. Barney, Esq.  
8 Nevada Bar No. 8366  
9 3317 W. Charleston Blvd., Suite B  
10 Las Vegas, NV 89102  
11 Attorney for Christopher D. Davis

12 [Remainder of Page Intentionally Left Blank]  
13  
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28

1 CERTIFICATE OF SERVICE

2 I hereby certify that I am an employee of Anthony L. Barney, Ltd. and not a  
3 party to this action. I further certify that on the 30<sup>th</sup> day of July, 2015, I served a copy of the  
4 foregoing Notice of Posting Cost Bond upon each of the parties via Odyssey E-Filing System  
5 pursuant to NRCP 5(b)(2)(D) and E.D.C.R. 8.05. I further certify that on the 30<sup>th</sup> day of July,  
6 2015, I served the foregoing Notice of Posting Cost Bond by first class US mail, postage  
7 prepaid, upon the following persons or entities:  
8

9 Tarja Davis  
10 3005 North Beverly Glen Circle  
11 Los Angeles, California 90077

12 Christopher Davis  
13 514 West 26<sup>th</sup> Street, #3E  
14 Kansas City, Missouri 64108

15 Winfield Davis  
16 Sky Line Terrace Apts.  
17 930 Figueroa Terr., Apt 529  
18 Los Angeles CA 90012-3072

19 Ace Davis  
20 C/o natural guardian Winfield Davis  
21 Sky Line Terrace Apts.  
22 930 Figueroa Terr., Apt 529  
23 Los Angeles CA 90012-3072

24 ANTHONY L. BARNEY, ESQ.  
25 ANTHONY L. BARNEY, LTD.  
26 3317 W. Charleston Boulevard, Suite B  
27 Las Vegas, NV 89102-1835  
28 [office@anthonybarney.com](mailto:office@anthonybarney.com)  
Attorneys for Christopher Davis

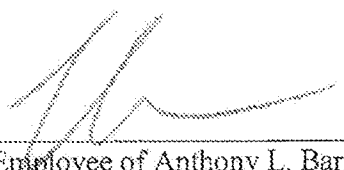
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Solomon Dwiggins & Freer, Ltd.  
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1 Las Vegas, NV 89129  
2 [msolomon@sdfnlaw.com](mailto:msolomon@sdfnlaw.com)  
3 [jhood@sdfnlaw.com](mailto:jhood@sdfnlaw.com)  
4 Attorneys for Caroline Davis

5 CHARLENE RENWICK, ESQ.  
6 LEE HERNANDEZ LANDRUM & GAROFALO  
7 7575 Vegas Drive #150  
8 Las Vegas, Nevada 89128  
9 [Crenwick@lee-lawfirm.com](mailto:Crenwick@lee-lawfirm.com)  
10 Attorneys for Dunham Trust Company

11 JONATHAN W. BARLOW, ESQ.  
12 CLEAR COUNSEL LAW GROUP  
13 50 Stephanie Street, Suite 101  
14 Henderson, Nevada 89012  
15 [Jonathan@clearcounsel.com](mailto:Jonathan@clearcounsel.com)  
16 Attorneys for Stephen K. Lenhardt

17 FHT Holdings LLC. A Nevada Limited Liability Company, Respondent  
18 Registered Agent Solutions, Inc.  
19 Registered Agent for FHT Holdings, LLC, a Nevada Limited Liability Company  
20 4625 West Nevso Drive, Suite 2  
21 Las Vegas, Nevada 89103

22  
23  
24  
25  
26  
27  
28  
  
Employee of Anthony L. Barney, Ltd.



FAMILY DOMESTIC  
**CASE SUMMARY**  
**CASE NO. P-15-083867-T**

**In the Matter of the Trust of:  
The Beatrice Davis Heritage Trust**

§  
§  
§  
§  
§

Location: **Family Domestic**  
Judicial Officer: **Judge Sturman, Probate**  
Hearing Master: **Yamashita, Wesley**  
Filed on: **02/11/2015**  
Cross-Reference Case Number: **P083867**

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**CASE INFORMATION**

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Case Type: **Probate -  
Trust/Conservatorships**  
Subtype: **Individual Trustee**  
Case Flags: **Appealed to the Nevada  
Supreme Court  
Matter to be heard by District  
Court Judge**

---

**DATE**

**CASE ASSIGNMENT**

---

**Current Case Assignment**

Case Number	P-15-083867-T
Court	Family Domestic
Date Assigned	02/11/2015
Judicial Officer	Judge Sturman, Probate
Hearing Master	Yamashita, Wesley

---

**PARTY INFORMATION**

---

**Petitioner**      **Davis, Caroline**

*Lead Attorneys*  
**Solomon, Mark Alan**  
*Retained*  
7028535483(W)

**Trust**      **The Beatrice Davis Heritage Trust**

---

**DATE**

**EVENTS & ORDERS OF THE COURT**

**INDEX**

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02/10/2015



Petition to Assume Jurisdiction of Trust

Filed by: Petitioner Davis, Caroline  
*Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D Davis As Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D Davis*

02/10/2015



Notice of Hearing

Filed by: Petitioner Davis, Caroline  
*Notice of Hearing on Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*











02/20/2015







Notice of Hearing

Filed by: Petitioner Davis, Caroline  
*Amended Notice of Hearing on Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis*






FAMILY DOMESTIC  
**CASE SUMMARY**  
**CASE NO. P-15-083867-T**

03/04/2015	 Motion to Dismiss Filed by: Other Davis, Christopher D <i>Christopher D. Davis' Motion To Dismiss Pursuant To NRCP (12)(b) And NRCP 19</i>
03/05/2015	 Notice of Hearing Filed by: Petitioner Davis, Caroline <i>Second Amended Notice of Hearing on Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher David As Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information From Christopher D. Davis</i>
03/05/2015	 Errata Filed by: Other Davis, Christopher D <i>Errata to Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19</i>
03/06/2015	 Notice of Appearance Party: Other Dunham Trust Company <i>Notice of Appearance</i>
03/06/2015	 <b>Petition - HM</b> (9:30 AM) (Hearing Master: Yamashita, Wesley) Events: 02/10/2015 Petition to Assume Jurisdiction of Trust <i>Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust Dated July 28 2000 as Amended on February 24 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis</i>
03/23/2015	 Notice of Motion Filed by: Other Davis, Christopher D <i>Notice of Motion on Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19</i>
03/24/2015	 Certificate of Service Filed by: Other Davis, Christopher D <i>Amended Certificate of Service</i>
04/08/2015	 Certificate of Service Filed by: Petitioner Davis, Caroline <i>Supplemental Certificate of Mailing Of: Second Amended Notice of hearing on Petition to Assume Jurisdiction over the Beatrice Davis Family Heritage Trust, Dated July 28, 2000 as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis</i>
04/13/2015	 Opposition to Motion to Dismiss Filed by: Petitioner Davis, Caroline <i>Opposition to Christopher D. Davis' Motion to Dismiss Pursuant to NRCP(12)(b) and NRCP 19</i>
04/16/2015	 Notice Filed by: Other Lehnardt, Stephen <i>Notice of Appearance</i>


FAMILY DOMESTIC  
**CASE SUMMARY**  
**CASE NO. P-15-083867-T**

04/16/2015	 <b>Opposition</b> Filed by: Other Lehnardt, Stephen <i>Opposition to Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis, and Limited Joinder to Christopher D. Davis's Motion to Dismiss Pursuant to NRCP 12(b) and NRCp 19</i>
04/20/2015	 <b>Reply</b> Filed by: Other Davis, Christopher D <i>Christopher D. Davis' Reply to Caroline Davis' Opposition to his Motion to Dismiss Pursuant to NRCP (12)(b) and NRCP 19</i>
04/20/2015	 <b>Reply</b> Filed by: Petitioner Davis, Caroline <i>Reply to Opposition to Petition to Assume Jurisdiction Over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information from Christopher D. Davis and Limited Joinder to Christopher D. Davis's Motion to Dismiss Pursuant to NRCP12(b) and NRCP 19</i>
04/22/2015	<b>Petition</b> (9:00 AM) (Judicial Officer: Sturman, Gloria) Events: 03/05/2015 Notice of Hearing <i>Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014; to Assume Jurisdiction Over Christopher David As Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor; to Confirm Dunham Trust Company as Directed Trustee; and for Immediate Disclosure of Documents and Information From Christopher D. Davis</i>
04/22/2015	<b>Motion to Dismiss</b> (9:00 AM) (Judicial Officer: Sturman, Gloria) Events: 03/04/2015 Motion to Dismiss <i>Motion on Christopher D. Davis' Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19</i>
04/22/2015	 <b>All Pending Motions</b> (9:00 AM) (Judicial Officer: Sturman, Gloria)
04/28/2015	 <b>Recorders Transcript of Hearing</b> Party: Trust The Beatrice Davis Heritage Trust <i>Transcrit of Proceedings Motion to Dismiss: Motion on Christopher Davis' Motion to Dismiss Pursuant to NRCP 12(B) and NRCP 19; Petition to Assume Jurisdiction over the Beatrice B. Davis Family Trust, Assume Jurisdiction over Christopher David as Investment Trust Advisor and Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate Disclosure of Documents and Information from Christopher D. Davis April 22, 2015</i>
06/24/2015	 <b>Order</b> Filed by: Other Davis, Christopher D <i>Order</i>
07/01/2015	 <b>Notice of Entry of Order</b> Filed by: Other Davis, Christopher D <i>Notice of Entry of Order</i>
07/13/2015	 <b>Certificate of Mailing</b> Filed by: Other Davis, Christopher D <i>Certificate of Mailing</i>

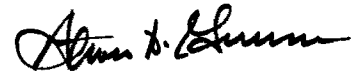
FAMILY DOMESTIC  
**CASE SUMMARY**  
**CASE NO. P-15-083867-T**

07/14/2015	 Certificate of Mailing Filed by: Other Davis, Christopher D <i>Supplement to Certificate of Mailing</i>
07/14/2015	 Notice Filed by: Other Davis, Christopher D <i>Notice of petition and petition for reconsideration of the order dated may 19, 2015 re: petition to assume jurisdiction over the Beatrice B. Davis family heritage trust dated July 28, 2000, as amended on February 24, 2014, to assume jurisdiction over Christopher D. Davis as investment trust advisor, Stpehen K. Lehnardt as distribution trust advisor, to confirm Dunham Trust Company as directed trustee, and for immediate disclosure of documents and information from Christopher D. Davis;</i>
07/14/2015	 Petition Filed by: Other Davis, Christopher D <i>Notice of Petition and Petition for Reconsideration of the Order Dated May 19, 2015 Re: Petition to Assumen Jurisdiction over the Beatrice B Davis Family Heritage Trust Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D Davis as Investment Trust Advisor, Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Imeediate Disclosure of Documents and Information from Christopher D Davis</i>
07/16/2015	 Certificate of Mailing Filed by: Other Davis, Christopher D <i>Certificate Of Mailing</i>
07/23/2015	 Ex Parte Application Filed by: Other Davis, Christopher D <i>Ex Parte Application for Order Shortening Time on Christopher Davis' Petition to Reconsider Order to Assume Jurisdiction, or in the alternative Petition to Stay the Court's Order Assuming Jurisdiction over Christopher Davis Dated May 19, 2015</i>
07/23/2015	 Certificate of Mailing Filed by: Other Davis, Christopher D <i>Certificate of Mailing</i>
07/28/2015	 Declaration Filed by: Other Davis, Christopher D <i>Declaration of Taria Davis</i>
07/29/2015	 Response Filed by: Other Dunham Trust Company <i>Response to Petition for Reconsideration</i>
07/30/2015	 Notice of Appeal Filed by: Other Davis, Christopher D <i>Notice of Appeal</i>
07/30/2015	 Case Appeal Statement Filed by: Other Davis, Christopher D <i>Case Appeal Statement</i>
07/30/2015	 Notice of Filing Cost Bond Filed by: Other Davis, Christopher D <i>Notice of Posting Cost Bond</i>

FAMILY DOMESTIC  
**CASE SUMMARY**  
**CASE NO. P-15-083867-T**

07/30/2015	 Order Shortening Time Filed by: Other Davis, Christopher D <i>Order Shortening Time to Set Hearing</i>
08/12/2015	<b>Petition</b> (9:00 AM) (Judicial Officer: Sturman, Gloria) <i>Petition for Reconsideration of the Order Dated May 19, 2015 Re: Petition to Assume Jurisdiction over the Beatrice B Davis Family Heritage Trust Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D Davis as Investment Trust Advisor, Stephen K. Lehnardt as Distribution Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate Disclosure of Documents and Information from Christopher D Davis</i>

DATE	FINANCIAL INFORMATION	
	<b>Other</b> Davis, Christopher D	
	Total Charges	247.00
	Total Payments and Credits	247.00
	<b>Balance Due as of 8/3/2015</b>	<b>0.00</b>
	<b>Other</b> Dunham Trust Company	
	Total Charges	223.00
	Total Payments and Credits	223.00
	<b>Balance Due as of 8/3/2015</b>	<b>0.00</b>
	<b>Other</b> Lehnardt, Stephen	
	Total Charges	223.00
	Total Payments and Credits	223.00
	<b>Balance Due as of 8/3/2015</b>	<b>0.00</b>
	<b>Petitioner</b> Davis, Caroline	
	Total Charges	544.00
	Total Payments and Credits	544.00
	<b>Balance Due as of 8/3/2015</b>	<b>0.00</b>
	<b>Other</b> Davis, Christopher	
	Registry and Trust Account-Probate Balance as of 8/3/2015	<b>500.00</b>



CLERK OF THE COURT

HARRIET H. ROLAND, ESQ.  
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Facsimile: (702) 259-1116  
*Attorneys for Christopher D. Davis*

**EIGHTH JUDICIAL DISTRICT COURT**

**CLARK COUNTY, NEVADA**

In the matter of:

The BEATRICE B. DAVIS FAMILY HERITAGE  
TRUST, dated July 28, 2000, as amended on  
February 24, 2014.

Case No.: P-15-083867-T

Dept. No.: 26

**Hearing Date: April 22, 2015**

**Hearing Time: 9:00 a.m.**

**ORDER**

This matter came before the Court for hearing on the 22<sup>nd</sup> day of April, 2015 at 9:00 a.m., upon the Christopher D. Davis's Motion to Dismiss Pursuant to NRCP 12(b) and NRCP 19 and Caroline Davis's Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution

1 Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate  
2 Disclosure of Documents and Information from Christopher D. Davis. Christopher D. Davis  
3 was represented by Harriet Roland, Esq. of the Roland Law Firm and Anthony L. Barney, Esq.,  
4 of the law office of Anthony L. Barney, Ltd., Caroline Davis was represented by Mark  
5 Solomon, Esq., of the law firm of Solomon Dwiggins and Freer, Ltd.; Stephen K. Lehnardt was  
6 represented by Jonathan W. Barlow, Esq. of the law office of Clear Counsel Law Group; and  
7 Dunham Trust Company was represented by Charlene N. Renwick, Esq., of the law office of  
8 Lee Hernandez Landrum & Garofalo. After reviewing the pleadings on file and in the court  
9 record, hearing oral arguments by both parties in this matter, being fully advised in the  
10 premises, and for good cause appearing, the Court hereby finds and orders the following:

11  
12  
13 IT IS FOUND that since the first amendment, Christopher has been directing the trust in  
14 Nevada, and that everyone involved relied on this amendment as being proper.

15  
16 IT IS FURTHER FOUND that the Court has no affidavit that another beneficiary existed  
17 at the time the first amendment was signed.

18  
19 IT IS FURTHER FOUND that the Court has jurisdiction as a constructive trust because  
20 action on behalf of the trust has been taken in Nevada.

21  
22 IT IS SO FOUND.

23  
24 WHEREFORE, IT IS HEREBY ORDERED, ADJUDGED AND DECREED that the  
25 Petition to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor is  
26 granted without prejudice.

27  
28 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
Assume Jurisdiction over Stephen K. Lehnardt as Distribution Trust Advisor is denied until a  
more definite statement is filed.

1 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
2 Confirm Dunham Trust Company as Directed Trustee is granted.

3 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition for  
4 Immediate Disclosure of Documents and Information from Christopher D. Davis is granted as to  
5 all information in his possession <sup>custody or control</sup> in his role as Investment Trust Advisor, <sup>and in his</sup>  
6 <sup>role as manager of FHR Holdings</sup>

7 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that Christopher D.  
8 Davis's Motion to Dismiss is denied.

9 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that upon agreement of  
10 all parties, this Court will retain jurisdiction and all matters will be heard by the probate judge.  
11


12 IT IS SO ORDERED, ADJUDGED AND DECREED.


13 DATED this 19<sup>th</sup> day of May, 2015.

14  
15  
16   
DISTRICT COURT JUDGE

17  
18 Respectfully Submitted by the Following:

Approved as to Form and Content:

19  
20   
21 HARRIET H. ROLAND, ESQ.  
22 NV Bar No. 5471  
23 **ROLAND LAW FIRM**  
24 2470 E. St. Rose Pkwy, Ste. 105  
25 Henderson, NV 89074  
26 Telephone: (702) 452-1500  
27 Facsimile: (702) 920-8903  
28 *Attorney for Christopher D. Davis*

  
JONATHAN W. BARLOW, ESQ.  
NV Bar No. 9964  
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50 South Stephanie Street, Ste. 101  
Henderson, Nevada 89012  
Telephone: (702) 476-5900  
Facsimile: (702) 924-0709  
*Attorney for Stephen K. Lehnardt*


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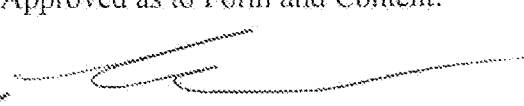
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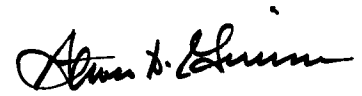
Approved as to Form and Content:

  
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CLERK OF THE COURT

**NOTIC**

**HARRIET H. ROLAND, ESQ.**  
Nevada Bar No. 5471  
**ROLAND LAW FIRM**  
2470 E. Saint Rose Pkwy., Suite #105  
Henderson, Nevada 89074  
Telephone: (702) 452-1500  
Facsimile: (702) 920-8903  
Email: hroland@rolandlawfirm.com  
Attorney for Christopher D. Davis

**DISTRICT COURT**  
**CLARK COUNTY, NEVADA**

In the Matter of

Case No.: **P-15-083867**  
Dept. No.: **Probate (26)**


**The BEATRICE B. DAVIS FAMILY**  
**HERITAGE TRUST, dated July 28, 2000, as**  
**amended on February 24, 2014.**

**NOTICE OF ENTRY OF ORDER**

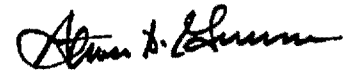
YOU AND EACH OF YOU WILL PLEASE TAKE NOTICE that the **Order** was entered  
by the Court on June 24, 2015 in the above-entitled matter, a copy of which is attached hereto.

DATED this 1<sup>st</sup> day of July, 2015.

**ROLAND LAW FIRM**

  
\_\_\_\_\_  
**HARRIET H. ROLAND, ESQ.**  
Nevada Bar No. 5471  
Attorney for Christopher D. Davis

ROLAND LAW FIRM  
2470 E. Saint Rose Pkwy., Ste. 105  
Henderson, NV 89074  
(702) 452-1500



CLERK OF THE COURT

1 HARRIET H. ROLAND, ESQ.  
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3 **ROLAND LAW FIRM**  
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9 TIFFANY S. BARNEY, ESQ.  
10 Nevada Bar No. 9754  
11 **ANTHONY L. BARNEY, LTD.**  
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14 Telephone: (702) 438-7878  
15 Facsimile: (702) 259-1116  
16 *Attorneys for Christopher D. Davis*

13 **EIGHTH JUDICIAL DISTRICT COURT**

14 **CLARK COUNTY, NEVADA**

15  
16 In the matter of:

17 The BEATRICE B. DAVIS FAMILY HERITAGE  
18 TRUST, dated July 28, 2000, as amended on  
19 February 24, 2014.

Case No.: P-15-083867-T

Dept. No.: 26

**Hearing Date: April 22, 2015**

**Hearing Time: 9:00 a.m.**

20  
21  
22 **ORDER**

23 This matter came before the Court for hearing on the 22<sup>nd</sup> day of April, 2015 at 9:00  
24 a.m., upon the Christopher D. Davis's Motion to Dismiss Pursuant to NRCP 12(b) and NRCP  
25 19 and Caroline Davis's Petition to Assume Jurisdiction over the Beatrice B. Davis Family  
26 Heritage Trust, Dated July 28, 2000, as Amended on February 24, 2014, to Assume Jurisdiction  
27 over Christopher D. Davis as Investment Trust Advisor and Stephen K. Lehnardt as Distribution  
28

1 Trust Advisor, to Confirm Dunham Trust Company as Directed Trustee, and for Immediate  
2 Disclosure of Documents and Information from Christopher D. Davis. Christopher D. Davis  
3 was represented by Harriet Roland, Esq. of the Roland Law Firm and Anthony L. Barney, Esq.,  
4 of the law office of Anthony L. Barney, Ltd., Caroline Davis was represented by Mark  
5 Solomon, Esq., of the law firm of Solomon Dwiggin and Freer, Ltd.; Stephen K. Lehnardt was  
6 represented by Jonathan W. Barlow, Esq. of the law office of Clear Counsel Law Group; and  
7 Dunham Trust Company was represented by Charlene N. Renwick, Esq., of the law office of  
8 Lee Hernandez Landrum & Garofalo. After reviewing the pleadings on file and in the court  
9 record, hearing oral arguments by both parties in this matter, being fully advised in the  
10 premises, and for good cause appearing, the Court hereby finds and orders the following:

13 IT IS FOUND that since the first amendment, Christopher has been directing the trust in  
14 Nevada, and that everyone involved relied on this amendment as being proper.

15 IT IS FURTHER FOUND that the Court has no affidavit that another beneficiary existed  
16 at the time the first amendment was signed.

18 IT IS FURTHER FOUND that the Court has jurisdiction as a constructive trust because  
19 action on behalf of the trust has been taken in Nevada.

20 IT IS SO FOUND.

21 WHEREFORE, IT IS HEREBY ORDERED, ADJUDGED AND DECREED that the  
22 Petition to Assume Jurisdiction over Christopher D. Davis as Investment Trust Advisor is  
23 granted without prejudice.

25 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
26 Assume Jurisdiction over Stephen K. Lehnardt as Distribution Trust Advisor is denied until a  
27 more definite statement is filed.  
28

1 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition to  
2 Confirm Dunham Trust Company as Directed Trustee is granted.

3 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that the Petition for  
4 Immediate Disclosure of Documents and Information from Christopher D. Davis is granted as to  
5 all information in his possession <sup>custody or control</sup> in his role as Investment Trust Advisor, and on his  
6 role as manager of FHY Holdings

7 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that Christopher D.  
8 Davis's Motion to Dismiss is denied.

9 IT IS FURTHER ORDERED, ADJUDGED AND DECREED that upon agreement of  
10 all parties, this Court will retain jurisdiction and all matters will be heard by the probate judge.


11 IT IS SO ORDERED, ADJUDGED AND DECREED.

12 DATED this 19<sup>th</sup> day of May, 2015.

13  
14  
15  
16   
17 DISTRICT COURT JUDGE

18 Respectfully Submitted by the Following:

Approved as to Form and Content:

19  
20   
21 HARRIET H. ROLAND, ESQ.  
22 NV Bar No. 5471  
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28 Attorney for Christopher D. Davis

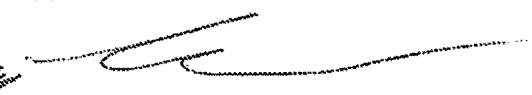
21 JONATHAN W. BARLOW, ESQ.  
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25 Henderson, Nevada 89012  
26 Telephone: (702) 476-5900  
27 Facsimile: (702) 924-0709  
28 Attorney for Stephen K. Lehnardt

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TIFFANY S. BARNEY, ESQ.  
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*Attorneys for Dunham Trust Company*

Approved as to Form and Content:

MARK A. SOLOMON, ESQ.  
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JOSHUA M. HOOD, ESQ.  
NV Bar No. 12777  
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Facsimile: (702) 853-5485  
*Attorneys for Caroline D. Davis*

**DISTRICT COURT  
CLARK COUNTY, NEVADA**

**Probate -  
Trust/Conservatorships**

**COURT MINUTES**

March 06, 2015

---

P-15-083867-T      In the Matter of the Trust of:  
The Beatrice Davis Heritage Trust

---

**March 06, 2015      9:30 AM      Petition - HM**

**HEARD BY:**    Yamashita, Wesley      **COURTROOM:**    RJC Courtroom 03F

**COURT CLERK:**    Carol Foley; Sharon Chun

**PARTIES:**

Caroline Davis, Petitioner, not present	Mark Solomon, Attorney, not present
Christopher Davis, Other, not present	Harriet Roland, Attorney, not present
Dunham Trust Company, Other, not present	Charlene Renwick, Attorney, not present
Stephen Lehnardt, Other, not present	Jonathan Barlow, Attorney, not present
The Beatrice Davis Heritage Trust, Trust, not present	

<b>JOURNAL ENTRIES</b>
------------------------

- PETITION TO ASSUME JURISDICTION OVER THE BEATRICE B. DAVIS FAMILY HERITAGE TRUST DATED JULY 28 2000 AS AMENDED ON FEBRUARY 24 2014; TO ASSUME JURISDICTION OVER CHRISTOPHER D. DAVIS AS INVESTMENT TRUST ADVISOR AND STEPHEN K LEHNARDT AS DISTRIBUTION TRUST ADVISOR; TO CONFIRM DUNHAM TRUST COMPANY AS DIRECTED TRUSTEE; AND FOR IMMEDIATE DISCLOSURE OF DOCUMENTS AND INFORMATION FROM CHRISTOPHER D. DAVIS

Joshua Hood, Esq. present on behalf of Caroline Davis, Petitioner.

Mr. Hood noted the opposing party, Christopher Davis, would like to have matter heard by the Probate Judge. Mr. Hood advised this petition has been re-noticed for 4/22/15 before Judge Sturman. COMMISSIONER RECOMMENDED, matter OFF CALENDAR.

**INTERIM CONDITIONS:**

PRINT DATE:	08/03/2015	Page 1 of 5	Minutes Date:	March 06, 2015
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**FUTURE HEARINGS:**

August 12, 2015 9:00 AM Petition  
Denman, Linda  
Sturman, Gloria  
Esparza, Kerry  
RJC Courtroom 03H

*Canceled: August 19, 2015 9:00 AM Petition*



**DISTRICT COURT  
CLARK COUNTY, NEVADA**

**Probate -  
Trust/Conservatorships**

**COURT MINUTES**

April 22, 2015

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P-15-083867-T      In the Matter of the Trust of:  
The Beatrice Davis Heritage Trust

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**April 22, 2015      9:00 AM      All Pending Motions**

**HEARD BY:** Sturman, Gloria

**COURTROOM:** RJC Courtroom 03H

**COURT CLERK:** Linda Denman

**PARTIES:**

Caroline Davis, Petitioner, not present	Mark Solomon, Attorney, present
Christopher Davis, Other, not present	Harriet Roland, Attorney, present
Dunham Trust Company, Other, not present	Charlene Renwick, Attorney, present
Stephen Lehnardt, Other, not present	Jonathan Barlow, Attorney, present
The Beatrice Davis Heritage Trust, Trust, not present	

<b>JOURNAL ENTRIES</b>
------------------------

- CHRISTOPHER D. DAVIS' MOTION TO DISMISS PURSUANT TO NRCP 12(b) AND NRCP 19

Counsel argued whether this Court has jurisdiction over the trust since not all the beneficiaries approved the transfer as required by the trust. Court and Mr. Solomon expressed confusion over which beneficiary did not agree to the transfer. Mr. Barney explained the wife of Christopher Davis, Tarre Davis, did not sign.

PETITION TO ASSUME JURISDICTION OVER THE BEATRICE B. DAVIS FAMILY HERITAGE TRUST, DATED JULY 28, 2000, AS AMENDED ON FEBRUARY 24, 2014; TO ASSUME JURISDICTION OVER CHRISTOPHER DAVIS AS INVESTMENT TRUST ADVISORY AND STEPHEN K. LEHNARDT AS DISTRIBUTION TRUST ADVISOR; TO CONFIRM DUNHAM TRUST COMPANY AS DIRECTED TRUSTEE; AND FOR IMMEDIATE DISCLOSURE OF DOCUMENTS AND INFORMATION FROM CHRISTOPHER D. DAVIS

Mr. Solomon explained the trust was funded by a \$35 million life insurance policy taken out on Cheryl Davis, ex-wife of Christopher. The policy has a \$4 million line of credit, which Christopher has allegedly borrowed against individually and through his companies. Under the terms of the

trust, his sister, Caroline, is a one-half lifetime beneficiary and she brings this petition in order to get information and an accounting on the trust. The first amendment moved the trust from Alaska to Nevada, signed by all beneficiaries, retained Dunham Trust Company as directed trustee, named Christopher as investment trust advisor, and Stephen Lehnardt as . Mr. Solomon argued that if Christopher was remarried at the time of the first amendment, then his wife would be the only person to have standing to oppose this Petition. Mr. Barlow, representing the trust protector, Stephen Lehnardt, argued his client should not be a named party as there are no current claims alleged against him. Ms. Renwick concurred with Mr. Solomon that Dunham should be confirmed as directed trustee.

Mr. Barney argued that the first amendment relocating the trust to Nevada was defective as a condition precedent had not been met. He stated this Court has no jurisdiction over the trust and asked the Court to deny the Petition.

COURT STATED ITS FINDINGS that since the first amendment, Christopher has been directing the trust in Nevada, and that everyone involved relied on this amendment as being proper. Further, the Court has no affidavit that another beneficiary existed at the time the first amendment was signed. COURT FURTHER FINDS it has jurisdiction as a constructive trust because action on behalf of the trust has been taken in Nevada. COURT ORDERED Petition to Assume Jurisdiction over the Beatrice B. Davis Family Heritage Trust, dated July 28, 2000, as amended on February 24, 2014 GRANTED as a constructive trust. COURT FURTHER ORDERED Petition to Assume Jurisdiction Over Christopher D. Davis as Investment Trust Advisor GRANTED WITHOUT PREJUDICE. COURT FURTHER ORDERED Petition to Assume Jurisdiction Over Stephen K. Lehnardt as Distribution Trust Advisor DENIED until a more definite statement is filed. COURT FURTHER ORDERED Petition to Confirm Dunham Trust Company as Directed Trustee GRANTED. COURT FURTHER ORDERED Petition for Immediate Disclosure of Documents and Information from Christopher D. Davis GRANTED as to all information in his possession. As to Christopher D. Davis' Motion to Dismiss, COURT ORDERED motion DENIED.

Upon agreement of all parties, this Court will retain jurisdiction and all matters will be heard by the Probate Judge.

Mr. Solomon to prepare proposed Order; opposing counsel to review as to form and content.

#### **INTERIM CONDITIONS:**

#### **FUTURE HEARINGS:**

August 12, 2015 9:00 AM Petition  
Denman, Linda  
Sturman, Gloria  
Esparza, Kerry  
RJC Courtroom 03H

*Canceled: August 19, 2015 9:00 AM Petition*

PRINT DATE:	08/03/2015	Page 4 of 5	Minutes Date:	March 06, 2015
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# Certification of Copy

State of Nevada }  
County of Clark } SS:

I, Steven D. Grierson, the Clerk of the Court of the Eighth Judicial District Court, Clark County, State of Nevada, does hereby certify that the foregoing is a true, full and correct copy of the hereinafter stated original document(s):

NOTICE OF APPEAL; CASE APPEAL STATEMENT; NOTICE OF POSTING  
COST BOND; DISTRICT COURT DOCKET ENTRIES; CIVIL COVER SHEET; ORDER; NOTICE  
OF ENTRY OF ORDER; DISTRICT COURT MINUTES

In the Matter of the Trust of:

The BEATRICE B. DAVIS FAMILY  
HERITAGE TRUST, dated July 28, 2000, as  
amended on February 24, 2014,

Case No: P083867

Dept No: FAMILY DOMESTIC

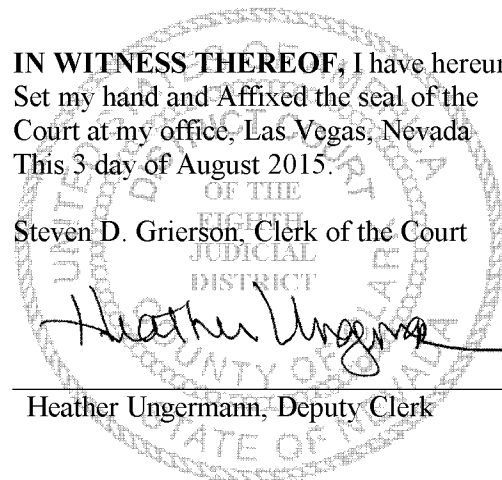
now on file and of record in this office.

IN WITNESS THEREOF, I have hereunto  
Set my hand and Affixed the seal of the  
Court at my office, Las Vegas, Nevada  
This 3 day of August 2015.

Steven D. Grierson, Clerk of the Court



Heather Ungermann, Deputy Clerk



ANTHONY L BARNEY LTD  
CLIENT TRUST ACCOUNT - IOLTA  
3317 W CHARLESTON BLVD SUITE B  
LAS VEGAS, NV 89102-1835

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90-78/1211

07/30/2015

Date

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order of

Clerk of the Supreme Court

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MP