CLERK OF THE COURT NOAS 1 Michael R. Mushkin, Esq. 2 Nevada Bar No. 2421 L. Joe Coppedge, Esq. 3 Nevada Bar No. 4954 Electronically Filed MUSHKIN CICA COPPEDGE Jan 29 2018 03:28 p.m. 4 4475 South Pecos Road Elizabeth A. Brown 5 Las Vegas, Nevada 89121 Clerk of Supreme Court (702) 386-3999 Telephone 6 (702) 454-3333 Facsimile michael@mccnvlaw.com 7 jcoppedge@mccnvlaw.com 8 Attorneys for Respondent, Doan L. Phung 9 EIGHTH JUDICIAL DISTRICT COURT 10 CLARK COUNTY, NEVADA 11 In the Matter of the: Case No.: P-16-089638-T 12 FUND FOR THE ENCOURAGEMENT OF Dept. No.: 26 13 SELF RELIANCE, 14 An Irrevocable Trust. 15 NOTICE OF APPEAL 16 Notice is hereby given that Doan L. Phung, Respondent in the above entitled matter, hereby 17 appeals to the Supreme Court of Nevada from the Order Denying Respondent, Doan L. Phung's 18 Objection to Probate Commissioner's Report and Recommendation and Order Granting Trustee 19 Thu-Le Doan to Decant the Assets of the Fund for the Encouragement of Self Reliance pursuant to 20 NRS 163.556 entered on December 27, 2018. DATED this // day of January, 2018 21 22 MUSHKIN CICA COPPEDGE 23 24 MICHAEL R. MUSHKIN, ESQ. Nevada Bar No. 2421 25 L. JOE COPPEDGE, ESQ. 26 Nevada Bar No. 4954 4495 S. Pecos Road 27 Las Vegas, Nevada 89121 28 Attorneys for Respondent, Doan L. Phung

Docket 74964 Document 2018-03978

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Case Number: P-16-089638-T

Page 1 of 2

#### CERTIFICATE OF SERVICE

I hereby certify that the foregoing *Notice of Appeal* was submitted electronically for filing and/or service with the Eighth Judicial District Court on this \_\_\_\_\_\_ day of January, 2018. Electronic service of the foregoing document shall be upon all parties listed on the Odyssey eFileNV service contact list.

An Employee of

MUSHKIN CICA COPPEDGE

**Electronically Filed** 1/19/2018 5:09 PM Steven D. Grierson **CLERK OF THE COURT** 

ASTA
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michael@mccnvlaw.com

Doan L. Phung

jcoppedge@mccnvlaw.com
Attorneys for Respondent,

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### EIGHTH JUDICIAL DISTRICT COURT

#### **CLARK COUNTY, NEVADA**

In the Matter of the:

Case No.: P-16-089638-T

FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE,

An Irrevocable Trust.

#### CASE APPEAL STATEMENT

Doan L. Phung, by and through his undersigned attorneys and for Case Appeal Statement, states as follows:

- Name of appellant filing this case appeal statement:
   Doan L. Phung
- 2. Identify the judge issuing the decision, judgment, or order appealed from:
  The Honorable Gloria Sturman.
- 3. Identify each appellant and the name and address of counsel for each appellant:

Michael R. Mushkin, Esq. Nevada State Bar No. 2421 Mushkin Cica Coppedge 4495 South Pecos Road Las Vegas, Nevada 89121

Doan L. Phung, Appellant

Page 1 of 4

Case Number: P-16-089638-T

28

L. Joe Coppedge, Esq. Nevada State Bar No. 4954 Mushkin Cica Coppedge 4495 South Pecos Road Las Vegas, Nevada 89121

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

Thu Le Doan, Respondent

Respondent's appellate counsel is unknown. Trial counsel was:

Dara J. Goldsmith, Esq. Nevada Bar No. 4270 Goldsmith & Guyman 2055 Village Center Circle Las Vegas, Nevada 89134

Peter Co, Esq. Nevada Bar No. 11938 Goldsmith & Guyman 2055 Village Center Circle Las Vegas, Nevada 89134

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

The attorneys identified above are licensed to practice law in Nevada.

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

Appellant was represented by retained counsel.

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

Appellant is represented by retained counsel.

8. Indicate whether appellant was granted leave to proceed in forma pauperis, and the date of entry of the district court order granting such leave:

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9. Indicate the date the proceedings commenced in the district court (e.g., date complaint, indictment, information, or petition was filed):

The Petition was filed on September 22, 2016.

10. Provide a brief description of the nature of the action and result in the district court, including the type of judgment or order being appealed and the relief granted by the district court:

Respondent, Thu Le Doan filed a Petition in the District Court for Clark County, Nevada as Case No. P-16-089638-T on September 22, 2016, requesting that the assets of the Fund for the Encouragement of Self Reliance ("FESR") be divided equally into separate irrevocable charitable trusts or, in the alternative, that the assets be divided equally and Petitioner's portion be decanted into her own charitable trust. The District Court entered an Order Denying Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Order Granting Trustee Thu-Le Doan to Decant the Assets of the Vietnamese-American Scholarship Fund Pursuant to NRS 163.556 on December 27, 2018. Respondent appeals from that Order.

Indicate whether the case has previously been the subject of an appeal to or original 11. writ proceeding in the Supreme Court and, if so, the caption and Supreme Court docket number of the prior proceeding:

This case has **not** been previously been the subject of an appeal to or original writ proceeding in the Supreme Court.

12. Indicate whether this appeal involves child custody or visitation:

This case does **not** involve child custody or visitation.

1	13. If this is a civil case, indicate whether this appeal involves the possibility of
2	settlement:
3	Settlement is unlikely.
4	DATED thisday of January, 2018
5	MUSHKIN CICA COPPEDGE
6	A to the second
7	MICHAEL R. MUSHKIN, ESQ.
8	Nevada Bar No. 2421
9	L. JØE COPPEDGE, ESQ. Nevada Bar No. 4954
10	4475 S. Pecos Road
11	Las Vegas, Nevada 89121 Attorneys for Respondent, Doan L. Phung
12	
13	
14	CERTIFICATE OF SERVICE
15	I hereby certify that the foregoing Case Appeal Statement was submitted electronically
16	for filing and/or service with the Eighth Judicial District Court on this 🂋 day of January, 2018
17	Electronic service of the foregoing document shall be upon all parties listed on the Odyssey
18	eFileNV service contact list.
19	
20	ALM)
21	LJOUY)
22	An Employee of MUSHKIN CICA COPPEDGE
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### **CASE SUMMARY** CASE NO. P-16-089638-T

In the Matter of the Trust of: Fund for the Encouragement of Self Reliance

Location: Family Domestic Judicial Officer: Judge Sturman, Probate Filed on: Cross-Reference Case P089638

09/22/2016

**CASE INFORMATION** 

§

Probate -Case Type:

Number:

Trust/Conservatorships

Case Flags: Appealed to Supreme Court

DATE CASE ASSIGNMENT

**Current Case Assignment** 

Case Number P-16-089638-T Court Family Domestic Date Assigned 09/22/2016

Judicial Officer Judge Sturman, Probate

**PARTY INFORMATION** 

Petitioner Doan, Thu Le Goldsmith, Dara J

Retained 702-873-9500(W)

Lead Attorneys

Trust Fund for the Encouragement of Self Reliance

COPPEDGE, L. JOE Respondent Phung, Doan L

Retained 7027927000(W)

DATE **EVENTS & ORDERS OF THE COURT INDEX** 09/22/2016 Petition Filed by: Petitioner Doan, Thu Le Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust 09/23/2016 Citation Filed by: Petitioner Doan, Thu Le Citation 09/28/2016 Notice of Hearing Filed by: Trust Fund for the Encouragement of Self Reliance Notice of Hearing for Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and To Modify Trust 09/30/2016 🚺 Affidavit of Mailing Filed by: Petitioner Doan, Thu Le Affidavit of Mailing 09/30/2016 🔄 Ex Parte Filed by: Trust Fund for the Encouragement of Self Reliance Ex Parte Application to Remove Cover Sheet From Petition 10/04/2016 Acceptance of Service

### CASE SUMMARY CASE NO. P-16-089638-T

	CASE NO. P-16-089638-T
	Filed by: Petitioner Doan, Thu Le Acceptance of Service
10/04/2016	Ex Parte Application  Filed by: Trust Fund for the Encouragement of Self Reliance  Ex Parte Application for an Order Shortening Time on Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
10/05/2016	Order Shortening Time  Filed by: Trust Fund for the Encouragement of Self Reliance  Order Shortening Time on Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
10/05/2016	Affidavit  Filed by: Trust Fund for the Encouragement of Self Reliance  Affidavit of Peter Co, Esq., in Support of Ex Parte Application for an Order Shortening Time on Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
10/06/2016	Notice of Entry of Order  Filed by: Trust Fund for the Encouragement of Self Reliance  Notice of Entry of Order Shortening Time on Petition to Assume In Rem Jurisdiction of Trust,  Confirm Trustee and to Modify Trust
10/06/2016	Affidavit of Service Filed by: Trust Fund for the Encouragement of Self Reliance Affidavit of Service
10/07/2016	Acknowledgment  Filed by: Trust Fund for the Encouragement of Self Reliance  Acknowledgment
10/12/2016	Initial Appearance Fee Disclosure Filed by: Petitioner Doan, Thu Le Initial Appearance Fee Disclosure
10/12/2016	Objection  Filed by: Respondent Phung, Doan L  Respondent's Objection to Petition to Assume In Rem Jurisdiction of Trust, Confirm and to Modify Trust, Request for Discovery and to Consolidate Matters
10/13/2016	Reply Filed by: Trust Fund for the Encouragement of Self Reliance Petitioner's Reply to Objection to Petition to Assume In Rem Jurisdiction of Trust, Confirm and to Modify Trust, Request for Discovery and to Consolidate Matters
10/14/2016	Citation - HM (9:30 AM) (Hearing Master: Yamashita, Wesley)  Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
10/14/2016	Affidavit of Service Filed by: Trust Fund for the Encouragement of Self Reliance Affidavit of Service
11/04/2016	Order Filed by: Trust Fund for the Encouragement of Self Reliance Order Approving Ex Parte Application to Remove Cover Sheet From Petition

# CASE SUMMARY CASE NO. P-16-089638-T

	CASE NO. P-10-009030-1
11/04/2016	Notice of Entry  Filed by: Trust Fund for the Encouragement of Self Reliance  Notice of Entry of Order Approving Ex Parte Application to Remove Cover Sheet from Petition
11/07/2016	Affidavit of Mailing Filed by: Trust Fund for the Encouragement of Self Reliance Affidavit of Mailing
11/10/2016	Transcript of Proceedings  Hearing Date October 14, 2016
11/10/2016	Final Billing of Transcript Filed by: Attorney Mushkin, Michael R. Hearing Date October 14, 2016
12/16/2016	Report and Recommendations  Filed by: Trust Fund for the Encouragement of Self Reliance  Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Confirming  Co-Trustees and to Modify Trust
12/19/2016	Notice of Entry  Filed by: Trust Fund for the Encouragement of Self Reliance  Notice of Entry of Order of Report and Recommendation Granting Petition to Assume  Jurisdiction of Trust, Confirming Co-Trustees and to Modify Trust
12/20/2016	Affidavit of Service Filed by: Petitioner Doan, Thu Le Affidavit of Service
12/30/2016	Objection Filed by: Respondent Phung, Doan L Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Request for Judicial Review
12/30/2016	Petition Filed by: Respondent Phung, Doan L Petition for Declaratory Judgment
01/04/2017	Certificate of Service Filed by: Respondent Phung, Doan L Certificate of Service
01/04/2017	Notice of Hearing Filed by: Respondent Phung, Doan L Notice of Hearing for Petition for Declaratory Judgment
01/13/2017	Opposition  Filed by: Petitioner Doan, Thu Le  Opposition to Petition for Declaratory Relief
01/17/2017	Affidavit of Service Filed by: Trust Fund for the Encouragement of Self Reliance Affidavit of Service

# CASE SUMMARY CASE NO. P-16-089638-T

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01/18/2017	Reply Filed by: Respondent Phung, Doan L Reply Brief in Support of Petition for Declaratory Judgment
01/20/2017	Petition - HM (9:30 AM) (Hearing Master: Yamashita, Wesley)  Petition for Declaratory Judgment
01/24/2017	Request Filed by: Respondent Phung, Doan L Request to Transfer Petition for Declaratory Judgment to Probate Judge
01/24/2017	Reply Filed by: Petitioner Doan, Thu Le Reply to Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Request for Judicial Review
01/24/2017	Notice of Non Opposition  Filed by: Respondent Phung, Doan L  Notice of Non-Opposition to Respondent, Doan L. Phung's Objection to Probate  Commissioner's Report and Recommendation
01/25/2017	Affidavit of Service Filed by: Petitioner Doan, Thu Le Affidavit of Service
01/26/2017	Reply Filed by: Respondent Phung, Doan L Reply in Support of Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation
02/01/2017	Motion (9:30 AM) (Judicial Officer: Sturman, Gloria)  Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Request for Judicial Review
02/15/2017	Recorders Transcript of Hearing  Recorder's Transcript of Proceeding: Motion: Respondent, Doan L. Phung's Objection to  Probate Commissioner's Report and Recommendations and Request for Judicial Review  Wednesday, February 1, 2017
03/14/2017	Order Filed by: Respondent Phung, Doan L Order Granting Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation in Part, and Remanding Case to Probate Commissioner for Decision Consistent with this Order
03/17/2017	Notice of Entry of Order  Filed by: Respondent Phung, Doan L  Notice of Entry of Order
03/24/2017	Request Filed by: Respondent Phung, Doan L Request to Place (1) Petition to Assume in Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust and (2) Petition for Declaratory Judgment on Probate Commissioner's Calendar for Decision

# CASE SUMMARY CASE NO. P-16-089638-T

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04/12/2017	Stipulation and Order Filed by: Petitioner Doan, Thu Le Stipulation and Order to Continue April 21, 2017 Hearing to April 28, 2017
04/13/2017	Notice of Entry Filed by: Trust Fund for the Encouragement of Self Reliance Notice of Entry of Stipulation and Order to Continue April 21, 2017 Hearing to April 28, 2017
04/14/2017	Affidavit of Service Filed by: Trust Fund for the Encouragement of Self Reliance Affidavit of Service
04/17/2017	Supplemental Filed by: Petitioner Doan, Thu Le Supplement to Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
04/21/2017	Petition - HM (9:30 AM) (Hearing Master: Yamashita, Wesley) 04/21/2017, 04/28/2017 Request to Place (1) Petition to Assume in Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust and (2) Petition for Declaratory Judgment on Probate Commissioner's Calendar for Decision
04/25/2017	Response Filed by: Respondent Phung, Doan L Response to Petitioner's Supplement to Petition to Assume in Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust
04/25/2017	Affidavit of Service Filed by: Petitioner Doan, Thu Le  Affidavit of Service
08/04/2017	Report and Recommendations  Filed by: Petitioner Doan, Thu Le  Report and Recommendation Confirming Prior Report and Recommendation Granting  Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions  of Law, Confirming Co-Trustees and to Modify Trust
08/04/2017	Notice of Entry  Filed by: Petitioner Doan, Thu Le  Notice of Entry of Report and Recommendation Confirming Prior Report and  Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional  Findings Of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust
08/08/2017	Affidavit of Service Filed by: Petitioner Doan, Thu Le Affidavit of Service
08/21/2017	Objection Filed by: Respondent Phung, Doan L Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume In Rem Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust, and Request for Judicial Review

## CASE SUMMARY CASE NO. P-16-089638-T

09/07/2017	Notice of Hearing on First and Final Accounting Filed by: Respondent Phung, Doan L Notice of Hearing for Respondent Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust, and Request for Judicial Review	
09/12/2017	Reply Filed by: Petitioner Doan, Thu Le Reply to Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust, and Request for Judicial Review	
09/13/2017	Affidavit of Service Filed by: Petitioner Doan, Thu Le Affidavit of Service	
10/05/2017	Reply Filed by: Respondent Phung, Doan L Reply Brief in Support for Respondent's Objection to the Probate Commissioner's Report and Recommendation	
10/12/2017	Objection - Probate (9:30 AM) (Judicial Officer: Sturman, Gloria)  Notice of Hearing for Respondent Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust, and Request for Judicial Review	
12/27/2017	Order Filed by: Petitioner Doan, Thu Le Order Denying Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Order Granting Trustee Thu-Le Doan to Decant the Assets of the Fund for the Encouragement of Self Reliance AKA Center for the Encouragement of Reliance Pursuant to NRS 163.556	
12/28/2017	Notice of Entry Filed by: Petitioner Doan, Thu Le Notice of Entry of Order Denying Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation and Order Granting Trustee Thu-Le Doan to Decant the Assets of the Fund for the Encouragement of Self Reliance AKA Center for the Encouragement of Reliance Pursuant to NRS 163.556	
12/28/2017	Affidavit of Service Filed by: Petitioner Doan, Thu Le Affidavit of Service	
01/19/2018	Notice of Appeal Filed by: Respondent Phung, Doan L Notice of Appeal	
01/19/2018	Case Appeal Statement Filed by: Respondent Phung, Doan L Case Appeal Statement	
DATE	FINANCIAL INFORMATION	

Petitioner Doan, Thu Le

## CASE SUMMARY CASE NO. P-16-089638-T

Total Charges Total Payments and Credits Balance Due as of 1/23/2018	600.00 600.00 <b>0.00</b>
Respondent Phung, Doan L Total Charges Total Payments and Credits Balance Due as of 1/23/2018	247.00 247.00 <b>0.00</b>
Trust Fund for the Encouragement of Self Reliance Total Charges Total Payments and Credits Balance Due as of 1/23/2018	45.50 45.50 <b>0.00</b>

## EIGHTH JUDICIAL DISTRICT COURT CLARK COUNTY, NEVADA FAMILY COURT COVER SHEET

P-16-089638-T

CASE	NO		(To l	be assigned by the Cler	rk's Off	ice)	
Do you or any other part case	(s) in the	Family Court of YES	r Juven	or child) have any ile Court in Clark \(\square\) NO side of this form	other o	current ca	se(s) or past
Plaintiff/Pe	ditioner	RTY INFORMATI	i   · · · · · ·	e Print) efendant/Responden me: Fund for the Encoura	CONSTRUCTOR THE	MARKET THREE BERNELLS	ard/Decedent
First Name: Thu-Le  Home Address: 4471 Dean Martin Dr. U	Middle Name	:	First Na		N	Middle Name:	
City, State, Zip: Las Vegas, NV 89103	nit 1010			Address: same			
Mailing Address: SAME AS ABOV	/F			ate, Zip:			
City, State, Zip:		TT 100 100 100 100 100 100 100 100 100 1		ate, Zip:			
	e of Birth: 07	7/12/1948	Phone #			Date of Birth:	N A
Attorney Info	ormation	entar NES			DE CHELESCON	rmation	
Name: DARA J. GOLDSMITH	nakusuub ili all	Bar No. 4270	Name:			/1114UU1	Bar No:
Address: 2055 VILLAGE CENTER CIRCLE		Address	S:				
City, State, Zip: LAS VEGAS, NV 89134		City, State, Zip:					
Phone #: (702) 873-9500		9	Phone #:				
//	Cl. I	1.6.1					*
DOMESTIC	Samuel St.	R DOMESTIC RELA PETITIONS	The second second	eing filed with this cover		I	PROBATE
Marriage Dissolution  ☐ Annulment ☐ Divorce —No minor child(ren) ☐ Divorce —With minor child(ren) ☐ Foreign Decree ☐ Joint Petition —No minor child(ren) ☐ Joint Petition — With minor child(ren) ☐ Separate Maintenance	Adopt Child Menta Name Patern Suppo Temp Termi Visita	ion –Minor ion –Adult Custody (Non-Divorc il Health Change iity ssion to Marry ort - Other orary Protective Order nation of Parental Rig tion (Non-Divorce) (identify)	(TPO)	Guardianship of an A Person Estate Person and Estate Guardianship of a M Person Estate Person Estate Person and Estate Guardianship Trust	<b>finor</b>	General A Special A Set Aside Trust/Con Indiv	nservatorships vidual Trustee orate Trustee
MISC. JUVENILE PETITIONS			IV-1	CHILD SUPPORT PET	ITIONS		
☐ Work Permit ☐ Emancipation		☐ DA – UIFSA		Chi	ld Suppor	t In State IV-D	
List children involved	d in this ca	se (If more than 3	children,	please enter the inform	nation c	n the revers	e side)
Last Name		First Name		Middle Name	Listako	e of Birth	Relationship
1.							Kelationship
2.	-	***************************************					
					<u> </u>		,
3.		h					
Meredith Deland		Signat	t t	Delan b		Q-C	72-2016

Revised 07/01/12 Eighth Judicial District Court Pursuant to NRS 3.275

Electronically Filed
12/27/2017 9:38 AM
Steven D. Grierson
CLERK OF THE COURT

**ORD** 

Dara J. Goldsmith, Esq. Nevada Bar No. 4270

dgoldsmith@goldguylaw.com

3 | Peter Co, Esq.

Nevada Bar No. 11938 pco@goldguylaw.com

2055 Village Center Circle

Las Vegas, Nevada 89134 Telephone: (702) 873-9500

6 Fax: (702) 873-9600

In the matter of the

SELF RELIANCE,

Attorneys for Petitioner, Thu-Le Doan

FUND FOR THE ENCOURAGEMENT OF

An Irrevocable Trust.

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# EIGHTH JUDICIAL DISTRICT COURT CLARK COUNTY, NEVADA

Case No.: P-16-089638-T

Dept.: 26

Date of Hearing: October 12, 2017

Time of Hearing: 9:30 a.m.

ORDER DENYING RESPONDENT, DOAN L. PHUNG'S OBJECTION TO PROBATE COMMISSIONER'S REPORT AND RECOMMENDATION AND ORDER GRANTING TRUSTEE THU-LE DOAN TO DECANT THE ASSETS OF THE FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE AKA CENTER FOR THE ENCOURAGEMENT OF RELIANCE PURSUANT TO NRS 163.556

This matter came on for hearing on October 12, 2017 before the Honorable Gloria Sturman on Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust entered on August 4, 2017. Respondent was present and represented by Michael R. Mushkin, Esq. and L. Joe Coppedge, Esq. of the law firm MUSHKIN CICA COPPEDGE. Petitioner, Thu-Le Doan was present and represented by Dara Goldsmith, Esq. and Peter Co, Esq. of the law firm Goldsmith & Guymon, P.C. The Court, having reviewed the

Case Number: P-16-089638-T

Objection, Petitioner's Reply thereto and Respondent's Reply Brief in support of the Objection, and having heard oral arguments from counsel, finds as follows.

- 1. That the Fund for the Encouragement of Self Reliance aka Center for the Encouragement of Reliance ("FESR") was created in Nevada, domiciled in Nevada and is subject to Nevada law.
- That Thu-Le Doan and Doan L. Phung were Co-Trustees of FESR when Thu-Le Doan filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016.
- 3. That a trustee has a legal right to decant a trust under NRS 163.556 if the following two prong test is met: (1) "[A] trustee with discretion or authority to distribute trust income or principal to or for a beneficiary of the trust may exercise such discretion or authority in favor of a second trust as provided in this section." NRS 163.556(1) and (2) "A trustee may not appoint property of the original trust to a second trust if: (a) Appointing the property will reduce any income interest of any income beneficiary of the original trust if the original trust is:...(2) A trust for which a charitable deduction has been taken for federal or state income, gift or estate tax purposes..." NRS 163.556(3).
- 4. That NRS 163.556 does not state that a trustee has an "absolute right" to decant a trust and that although the Probate Commissioner had incorrectly used the term "absolute right", the Probate Commissioner correctly analyzed NRS 163.556 in finding that Petitioner, Thu-Le Doan, had a right to decant FESR.
- 5. That the Probate Commissioner fully analyzed NRS 163.556 and correctly found that Petitioner as Co-Trustee of FESR met the two prong test: (1) that Petitioner had the power of invasion of principal of the trust assets and (2) that there is no reduction of any income interest of any income beneficiary of the trust; and as such has the right to decant FESR.

- 6. That Petitioner as Co-Trustee of FESR had the legal right to decant FESR when she initially filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016, and that whether or not Petitioner was subsequently removed as Co-Trustee of FESR, does not affect Petitioner's ability to proceed with her petition to decant FESR.
- 7. That the Probate Commissioner refused to enjoin FESR from continuing to act, and as the trust continued to act, Petitioner was removed as a Co-Trustee for her failure to participate.
- 8. That the Court did not address whether removing Petitioner as a Co-Trustee was wrong as the Court does not believe that it has to look at that since Petitioner had the right to decant FESR when she initiated the action.
- 9. That although the parties Marital Settlement Agreement limited a trustee's discretion to make distributions in excess of \$5,000.00, unless agreed to in writing by both trustees, such a limitation did not affect the purpose of FESR which was to provide "micro loans" at favorable interest rates for the purpose of enabling individuals to pursue a trade or business.
- 10. That Petitioner, Thu-Le Doan, as Co-Trustee of FESR has a legal right to decant FESR.
- 11. That as a matter of law, the Probate Commissioner did not err in applying NRS 163.556, that the Probate Commissioner came to the right conclusion, but used the incorrect term "absolute right" versus "right".
- 12. That Respondent, Doan L. Phung's Objection to the Probate Commissioner's Report and Recommendation is denied.
- 13. That all of the assets of FESR should be divided equally and Thu-Le Doan's portion is to be decanted into Thu-Le Doan's separate irrevocable charitable trust with Thu-Le Doan serving as sole trustee of her separate irrevocable charitable trust and Doan L. Phung's Page 3 of 8

portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be decanted into a new separate irrevocable charitable trust with Doan L. Phung serving as the sole Trustee of his new separate irrevocable charitable trust.

- 14. That all the assets of FESR including but not limited to: Fidelity accounts x4784, x4840, x9909, x9921, x2574 & x2575; Bank of America account x2956; and any and all real or personal property owned by FESR shall be divided equally and Thu-Le Doan's portion shall be distributed to Thu-Le Doan as Trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be distributed to Doan L. Phung as Trustee of his new separate irrevocable charitable trust.
- 15. That a certified copy of this Order may be presented to effectuate any such transfers.
- 16. That if one party violates the Charter and causes a tax effect upon the other party, the violating party shall indemnify the other party and make good of it.
- 17. That the VIETNAMESE-AMERICAN SCHOLARSHIP FUND case no. P-16-089637-T and the FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE case no. P-16-089638-T should not be consolidated.
- 18. That this Court should relinquish jurisdiction in accordance with NRS 164.010(3) after the requested relief is granted and proof of the decanting and funding is provided to the Court by Thu-Le Doan.
- 19. That the Petition to Assume Jurisdiction of Trust, Confirm Trustee, and to Modify Trust ought to be granted.

Based on the foregoing findings, it is hereby

ORDERED, ADJUDGED AND DECREED that the Fund for the Encouragement of Self Reliance aka Center for the Encouragement of Reliance ("FESR") was created in Nevada, domiciled in Nevada and is subject to Nevada law;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Thu-Le Doan and Doan L. Phung were Co-Trustees of FESR when Thu-Le Doan filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that a trustee has a legal right to decant a trust under NRS 163.556 if the following two prong test is met: (1) "[A] trustee with discretion or authority to distribute trust income or principal to or for a beneficiary of the trust may exercise such discretion or authority in favor of a second trust as provided in this section." NRS 163.556(1) and (2) "A trustee may not appoint property of the original trust to a second trust if: (a) Appointing the property will reduce any income interest of any income beneficiary of the original trust if the original trust is:...(2) A trust for which a charitable deduction has been taken for federal or state income, gift or estate tax purposes..." NRS 163.556(3);

IT IS FURTHER ORDERED ADJUDGED AND DECREED that NRS 163.556 does not state that a trustee has an "absolute right" to decant a trust and that although the Probate Commissioner had incorrectly used the term "absolute right", the Probate Commissioner had correctly analyzed NRS 163.556 in finding that Petitioner, Thu-Le Doan, had a right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Probate Commissioner fully analyzed NRS 163.556 and correctly found that Petitioner as Co-Trustee of FESR met the two prong test: (1) that Petitioner had the power of invasion of principal of the trust assets and (2) that there is no reduction of any income interest of any income beneficiary of the trust; and as such has the right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Petitioner as Co-Trustee of FESR had the legal right to decant FESR when she initially filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016, and that whether or not Petitioner was subsequently removed as Co-Trustee of FESR, does not affect Petitioner's ability to proceed with her petition to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Probate Commissioner refused to enjoin FESR from continuing to act, and as the trust continued to act, Petitioner was removed as a Co-Trustee for her failure to participate.

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Court did not address whether removing Petitioner as a Co-Trustee was wrong as the Court does not believe that it has to look at that since Petitioner had the right to decant VASF when she initiated the action.

IT IS FURTHER ORDERED ADJUDGED AND DECREED that although the parties Marital Settlement Agreement limited a trustee's discretion to make distributions in excess of \$5,000.00, unless agreed to in writing by both trustees, such a limitation did not affect the purpose of FESR which was to provide "micro loans" at favorable interest rates for the purpose of enabling individuals to pursue a trade or business;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Petitioner, Thu-Le Doan, as Co-Trustee of FESR has a legal right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that as a matter of law, the Probate Commissioner did not err in applying NRS 163.556, that the Probate Commissioner came to the right conclusion, but used the incorrect term "absolute right" versus "right";

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Respondent,

Doan L. Phung's Objection to the Probate Commissioner's Report and Recommendation is denied;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that all of the assets of FESR should be divided equally and Thu-Le Doan's portion is to be decanted into Thu-Le Doan's Page 6 of 8

separate irrevocable charitable trust with Thu-Le Doan serving as sole trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be decanted into a new separate irrevocable charitable trust with Doan L. Phung serving as the sole Trustee of his new separate irrevocable charitable trust;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that all the assets of FESR including but not limited to: Fidelity accounts x4784, x4840, x9909, x9921, x2574 & x2575; Bank of America account x2956; and any and all real or personal property owned by FESR shall be divided equally and Thu-Le Doan's portion shall be distributed to Thu-Le Doan as Trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be distributed to Doan L. Phung as Trustee of his new separate irrevocable charitable trust;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that a certified copy of this Order may be presented to effectuate any such transfers;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that if either party violates the Charter and causes a tax effect upon the other party, the violating party shall indemnify the other party and make good of it;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the VIETNAMESE-AMERICAN SCHOLARSHIP FUND case no. P-16-089637-T and the FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE case no. P-16-089638-T should not be consolidated;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that this Court should relinquish jurisdiction in accordance with NRS 164.010(3) after the requested relief is granted and proof of the decanting and funding is provided to the Court by Thu-Le Doan; and

#### IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Petition to 1 Assume Jurisdiction of Trust, Confirm Trustee, and to Modify Trust ought to be granted. 2 Dated this 2lday of December, 2017 3 4 5 ĎISTRÍCT COŬRT 6 7 Submitted by: 8 GOLDSMITH & GUYMON, P.C. 9 10 Dara J. Goldsmith, Esq. 11 Nevada Bar No. 4270 Peter Co, Esq. 12 Nevada Bar No. 11938 2055 Village Center Circle 13 Las Vegas, NV 89134 14 Attorneys for Petitioner, Thu-Le Doan 15 Approved as to form and content by: 16 MUSHKAN QICA COPPEDGE 17 18 Michael R. Mushkin, Esq. Nevada Bar No. 2421 L. Joe Coppedge, Esq. Nevada Bar No. 4954 20 4775 South Pecos Road Las Vegas, NV 89121 21 Attorneys for Respondent, Doan L. Phung 22 W:\DJG\AT\1833-2 Doan\Order Denying Objection to RAR FESR.docx 23 24 25 26 27

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1 CODE: NEO GOLDSMITH & GUYMON, P.C. Dara J. Goldsmith, Esq. Nevada Bar No. 4270 Email: dgoldsmith@goldguylaw.com Peter Co, Esq. Nevada Bar No. 11938 Email: pco@goldguylaw.com 2055 Village Center Circle Las Vegas, Nevada 89134 Telephone: (702) 873-9500 Facsimile: (702) 873-9600 Attorneys for Thu-Le Doan, Trustor of the FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE 9 DISTRICT COURT 10 CLARK COUNTY, NEVADA 11 In the Matter of the Case No. P-16-089638-T 12 FUND FOR THE ENCOURAGEMENT OF Department PC1 SELF RELIANCE 13 An Irrevocable Trust. 14 15 NOTICE OF ENTRY OF ORDER DENYING RESPONDENT, DOAN L. PHUNG'S OBJECTION TO PROBATE COMMISSIONER'S REPORT AND RECOMMENDATION AND 16 ORDER GRANTING TRUSTEE THU-LE DOAN TO DECANT THE ASSETS OF THE FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE AKA CENTER FOR THE 17 ENCOURAGEMENT OF RELIANCE PURSUANT TO NRS 163.556 18 TO ALL PARTIES IN INTEREST: 19 YOU ARE HEREBY NOTICED that the above-entitled Order, filed on 20 December 27, 2017, was entered herein on December 28, 2017. A copy of 21 said Order is attached hereto. 22 DATED this 28th day of December, 2017. 23 SUBMITTED BY: 24 GOLDSMITH & GUYMON, P.C. 25 By: Dara J. Goldsmith, Esq. 26 Nevada Bar No. 4270 Peter Co, Esq. 27 Nevada Bar No. 11938 2055 Village Center Circle 28 Las Vegas, Nevada 89134 (702) 873-9500

**Electronically Filed** 12/27/2017 9:38 AM Steven D. Grierson CLERK OF THE COURT

ORD

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Attorneys for Petitioner, Thu-Le Doan

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EIGHTH JUDICIAL DISTRICT COURT CLARK COUNTY, NEVADA

In the matter of the

FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE,

An Irrevocable Trust.

Case No.: P-16-089638-T

Dept.: 26

Date of Hearing: October 12, 2017 Time of Hearing: 9:30 a.m.

ORDER DENYING RESPONDENT, DOAN L. PHUNG'S OBJECTION TO PROBATE COMMISSIONER'S REPORT AND RECOMMENDATION AND ORDER GRANTING TRUSTEE THU-LE DOAN TO DECANT THE ASSETS OF THE FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE AKA CENTER FOR THE **ENCOURAGEMENT OF RELIANCE PURSUANT TO NRS 163.556** 

This matter came on for hearing on October 12, 2017 before the Honorable Gloria Sturman Respondent, Doan L. Phung's Objection to Probate Commissioner's Report and Recommendation Confirming Prior Report and Recommendation Granting Petition to Assume Jurisdiction of Trust, Making Additional Findings of Fact and Conclusions of Law, Confirming Co-Trustees and to Modify Trust entered on August 4, 2017. Respondent was present and represented by Michael R. Mushkin, Esq. and L. Joe Coppedge, Esq. of the law firm MUSHKIN CICA COPPEDGE. Petitioner, Thu-Le Doan was present and represented by Dara Goldsmith, Esq. and Peter Co, Esq. of the law firm Goldsmith & Guymon, P.C. The Court, having reviewed the

Objection, Petitioner's Reply thereto and Respondent's Reply Brief in support of the Objection, and having heard oral arguments from counsel, finds as follows.

- 1. That the Fund for the Encouragement of Self Reliance aka Center for the Encouragement of Reliance ("FESR") was created in Nevada, domiciled in Nevada and is subject to Nevada law.
- That Thu-Le Doan and Doan L. Phung were Co-Trustees of FESR when Thu-Le Doan filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016.
- 3. That a trustee has a legal right to decant a trust under NRS 163.556 if the following two prong test is met: (1) "[A] trustee with discretion or authority to distribute trust income or principal to or for a beneficiary of the trust may exercise such discretion or authority in favor of a second trust as provided in this section." NRS 163.556(1) and (2) "A trustee may not appoint property of the original trust to a second trust if: (a) Appointing the property will reduce any income interest of any income beneficiary of the original trust if the original trust is:...(2) A trust for which a charitable deduction has been taken for federal or state income, gift or estate tax purposes..." NRS 163.556(3).
- 4. That NRS 163.556 does not state that a trustee has an "absolute right" to decant a trust and that although the Probate Commissioner had incorrectly used the term "absolute right", the Probate Commissioner correctly analyzed NRS 163.556 in finding that Petitioner, Thu-Le Doan, had a right to decant FESR.
- 5. That the Probate Commissioner fully analyzed NRS 163.556 and correctly found that Petitioner as Co-Trustee of FESR met the two prong test: (1) that Petitioner had the power of invasion of principal of the trust assets and (2) that there is no reduction of any income interest of any income beneficiary of the trust; and as such has the right to decant FESR.

- 6. That Petitioner as Co-Trustee of FESR had the legal right to decant FESR when she initially filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016, and that whether or not Petitioner was subsequently removed as Co-Trustee of FESR, does not affect Petitioner's ability to proceed with her petition to decant FESR.
- 7. That the Probate Commissioner refused to enjoin FESR from continuing to act, and as the trust continued to act, Petitioner was removed as a Co-Trustee for her failure to participate.
- 8. That the Court did not address whether removing Petitioner as a Co-Trustee was wrong as the Court does not believe that it has to look at that since Petitioner had the right to decant FESR when she initiated the action.
- 9. That although the parties Marital Settlement Agreement limited a trustee's discretion to make distributions in excess of \$5,000.00, unless agreed to in writing by both trustees, such a limitation did not affect the purpose of FESR which was to provide "micro loans" at favorable interest rates for the purpose of enabling individuals to pursue a trade or business.
- 10. That Petitioner, Thu-Le Doan, as Co-Trustee of FESR has a legal right to decant FESR.
- 11. That as a matter of law, the Probate Commissioner did not err in applying NRS 163.556, that the Probate Commissioner came to the right conclusion, but used the incorrect term "absolute right" versus "right".
- 12. That Respondent, Doan L. Phung's Objection to the Probate Commissioner's Report and Recommendation is denied.
- 13. That all of the assets of FESR should be divided equally and Thu-Le Doan's portion is to be decanted into Thu-Le Doan's separate irrevocable charitable trust with Thu-Le Doan serving as sole trustee of her separate irrevocable charitable trust and Doan L. Phung's Page 3 of 8

portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be decanted into a new separate irrevocable charitable trust with Doan L. Phung serving as the sole Trustee of his new separate irrevocable charitable trust.

- 14. That all the assets of FESR including but not limited to: Fidelity accounts x4784, x4840, x9909, x9921, x2574 & x2575; Bank of America account x2956; and any and all real or personal property owned by FESR shall be divided equally and Thu-Le Doan's portion shall be distributed to Thu-Le Doan as Trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be distributed to Doan L. Phung as Trustee of his new separate irrevocable charitable trust.
- 15. That a certified copy of this Order may be presented to effectuate any such transfers.
- 16. That if one party violates the Charter and causes a tax effect upon the other party, the violating party shall indemnify the other party and make good of it.
- 17. That the VIETNAMESE-AMERICAN SCHOLARSHIP FUND case no. P-16-089637-T and the FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE case no. P-16-089638-T should not be consolidated.
- 18. That this Court should relinquish jurisdiction in accordance with NRS 164.010(3) after the requested relief is granted and proof of the decanting and funding is provided to the Court by Thu-Le Doan.
- 19. That the Petition to Assume Jurisdiction of Trust, Confirm Trustee, and to Modify Trust ought to be granted.

Based on the foregoing findings, it is hereby

**ORDERED, ADJUDGED AND DECREED** that the Fund for the Encouragement of Self Reliance aka Center for the Encouragement of Reliance ("FESR") was created in Nevada, domiciled in Nevada and is subject to Nevada law;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Thu-Le Doan and Doan L. Phung were Co-Trustees of FESR when Thu-Le Doan filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that a trustee has a legal right to decant a trust under NRS 163.556 if the following two prong test is met: (1) "[A] trustee with discretion or authority to distribute trust income or principal to or for a beneficiary of the trust may exercise such discretion or authority in favor of a second trust as provided in this section." NRS 163.556(1) and (2) "A trustee may not appoint property of the original trust to a second trust if: (a) Appointing the property will reduce any income interest of any income beneficiary of the original trust if the original trust is:...(2) A trust for which a charitable deduction has been taken for federal or state income, gift or estate tax purposes..." NRS 163.556(3);

IT IS FURTHER ORDERED ADJUDGED AND DECREED that NRS 163.556 does not state that a trustee has an "absolute right" to decant a trust and that although the Probate Commissioner had incorrectly used the term "absolute right", the Probate Commissioner had correctly analyzed NRS 163.556 in finding that Petitioner, Thu-Le Doan, had a right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Probate Commissioner fully analyzed NRS 163.556 and correctly found that Petitioner as Co-Trustee of FESR met the two prong test: (1) that Petitioner had the power of invasion of principal of the trust assets and (2) that there is no reduction of any income interest of any income beneficiary of the trust; and as such has the right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Petitioner as Co-Trustee of FESR had the legal right to decant FESR when she initially filed her Petition to Assume In Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust on September 22, 2016, and that whether or not Petitioner was subsequently removed as Co-Trustee of FESR, does not affect Petitioner's ability to proceed with her petition to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Probate Commissioner refused to enjoin FESR from continuing to act, and as the trust continued to act, Petitioner was removed as a Co-Trustee for her failure to participate.

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the Court did not address whether removing Petitioner as a Co-Trustee was wrong as the Court does not believe that it has to look at that since Petitioner had the right to decant VASF when she initiated the action.

IT IS FURTHER ORDERED ADJUDGED AND DECREED that although the parties Marital Settlement Agreement limited a trustee's discretion to make distributions in excess of \$5,000.00, unless agreed to in writing by both trustees, such a limitation did not affect the purpose of FESR which was to provide "micro loans" at favorable interest rates for the purpose of enabling individuals to pursue a trade or business;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Petitioner, Thu-Le Doan, as Co-Trustee of FESR has a legal right to decant FESR;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that as a matter of law, the Probate Commissioner did not err in applying NRS 163.556, that the Probate Commissioner came to the right conclusion, but used the incorrect term "absolute right" versus "right";

IT IS FURTHER ORDERED ADJUDGED AND DECREED that Respondent,

Doan L. Phung's Objection to the Probate Commissioner's Report and Recommendation is denied;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that all of the assets of FESR should be divided equally and Thu-Le Doan's portion is to be decanted into Thu-Le Doan's Page 6 of 8

separate irrevocable charitable trust with Thu-Le Doan serving as sole trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be decanted into a new separate irrevocable charitable trust with Doan L. Phung serving as the sole Trustee of his new separate irrevocable charitable trust;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that all the assets of FESR including but not limited to: Fidelity accounts x4784, x4840, x9909, x9921, x2574 & x2575; Bank of America account x2956; and any and all real or personal property owned by FESR shall be divided equally and Thu-Le Doan's portion shall be distributed to Thu-Le Doan as Trustee of her separate irrevocable charitable trust and Doan L. Phung's portion can either remain in FESR with Doan L. Phung serving as the sole Trustee of FESR OR Doan L. Phung's portion may be distributed to Doan L. Phung as Trustee of his new separate irrevocable charitable trust;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that a certified copy of this Order may be presented to effectuate any such transfers;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that if either party violates the Charter and causes a tax effect upon the other party, the violating party shall indemnify the other party and make good of it;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that the VIETNAMESE-AMERICAN SCHOLARSHIP FUND case no. P-16-089637-T and the FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE case no. P-16-089638-T should not be consolidated;

IT IS FURTHER ORDERED ADJUDGED AND DECREED that this Court should relinquish jurisdiction in accordance with NRS 164.010(3) after the requested relief is granted and proof of the decanting and funding is provided to the Court by Thu-Le Doan; and

1	IT IS FURTHER ORDERED AT	DJUDGED AND DECREED that the Petition
2	Assume Jurisdiction of Trust, Confirm Trustee, and	to Modify Trust ought to be granted.
3	Dated this 21 day of December, 2017	
4		
5		
6	DISTI	RICT COURT JUDGE
7		
8	Submitted by:	
9	GOLDSMITH & GUYMON, P.C.	
10	To	
11	Dara J. Goldsmith, Esq. Nevada Bar No. 4270	
12	Peter Co, Esq. Nevada Bar No. 11938	
13	2055 Village Center Circle	
14	Las Vegas, NV 89134 Attorneys for Petitioner, Thu-Le Doan	
15	Approved as to form and content by:	
16		
17 -	MUSHKAN CICA COPPEDGE	
18	M. Strike	
10	Michael R. Mushkin, Esq. Nevada Bar No. 2421	
. 1	L. Joe Coppedge, Esq. Nevada Bar No. 4954	
20	4775 South Pecos Road	
21	Las Vegas, NV 89121 Attorneys for Respondent, Doan L. Phung	
22	W:\DJG\AT\1833-2 Doan\Order Denying Objection to RAR FESR.docx	
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## DISTRICT COURT CLARK COUNTY, NEVADA

**Probate -** COURT MINUTES October 14, 2016

Trust/Conservatorships

P-16-089638-T In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

October 14, 2016 9:30 AM Citation - HM

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

**COURT CLERK:** Sharon Chun

**PARTIES:** 

Doan Phung, Respondent, present

L. JOE COPPEDGE, Attorney, not present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, present Dara Goldsmith, Attorney, present

#### **JOURNAL ENTRIES**

- PETITION TO ASSUME IN REM JURISDICTION OF TRUST, CONFIRM TRUSTEE AND TO MODIFY TRUST

COMMISSIONER ADVISED he will hear both cases together at this time:

P089637 - Vietnamese American Scholarship Fund and

P089638 - Fund For the Encouragement of Self Reliance together.

ALSO PRESENT at Ms. Goldsmith's table: Marshal Willick, Esq., Thu Le Doan's primary counsel in the other case that was raised in the Opposition.

COMMISSIONER NOTED he has read everything and is aware of the position of both sides. COMMISSIONER ALSO NOTED there is the principle of decanting and ADVISED that this Court can make irrevocables, changeable, upon proper conditions and proper reasons why.

PRINT DATE:	01/23/2018	Page 1 of 13	Minutes Date:	October 14, 2016

COMMISSIONER STATED that it appears the administration of the Trusts are at a loggerhead and the parties cannot function together to accomplish the goals of the Trusts. COMMISSIONER INQUIRED why the parties do not split, decant, and control their own Trust?

Mr. Mushkin, Mr. Coppedge, and Ms. Goldsmith argued in support of their moving papers. Mr. Mushkin requested an evidentiary hearing set.

COMMISSIONER RECOMMENDED a Report and Recommendation to issue as to the following:

#### COMMISSIONER FINDS AND RECOMMENDS:

- 1) This Court takes jurisdiction of both of these Trusts.
- 2) This Court will recognize and confirm Trustees.
- 3) Because of the administrative issues, the functional purposes of the Trusts really cannot be accomplished and is unworkable. In order to be able to accomplish and not to have to worry about what each side is doing and that each side may or may not be over-controlling, there is sufficient reason and it is appropriate, to DECANT INTO A NEW ONE ON MS. GOLDSMITH'S SIDE AND MR. MUSHKIN'S SIDE MAY MAKE A CHOICE ON THE DECANT OR TO RETAIN THE OLD ONE.

COMMISSIONER ADVISED that both sides need an understanding that if one side does something that violates the Charter, so to speak, and causes a tax effect upon the other party, they are to indemnify and to make good if it does come about.

Ms. Goldstein inquired if the Court will put into effect that no action will be taken by each other. Mr. Mushkin requested \$16 Million Dollar bond set because that is what is in the Trusts right now. Mr. Mushkin reiterated that if the Court were to take evidence it would show that all of the work, all of the time, for all of the Trusts, has been done by his client and the participant has been a passive participant. He also noted that applications for scholarships are waiting and if stopped, then no charitable purpose can take place; that is not appropriate.

COMMISSIONER RECOMMENDED, if these are legitimate scholarships, they ought to be continuing. Ms. Goldsmith stated she thought they could make determinations by reviewing the scholarship applications. COMMISSIONER ADMONISHED parties that given the direction right now, they are to use all caution. As of this point, if they wish to grant any scholarships, it may ultimately be split out of Dr. Phung s half. COMMISSIONER STATED they are encouraged to look at it and if there is to be a continuation of genuine scholarships, that part needs to be examined.

Mr. Mushkin reiterated his bond inquiry. COMMISSIONER ADVISED that as to anything of another nature, he cannot issue any kind of injunction without some type of bond and queried if the parties

PRINT DATE:	01/23/2018	Page 2 of 13	Minutes Date:	October 14, 2016

can work together or if the Court will have to require a substantial bond in the interim. Ms. Goldsmith reiterated they will try to reach an agreement if all pending scholarship applications are forwarded to her client for review. She suggested that all scholarship distributions are allocated from Dr. Phung's half of the charitable trusts.

COMMISSIONER RECOMMENDED that at this point, the scholarship program continues, upon which they must agree. COMMISSIONER FURTHER RECOMMENDED that Dr. Phung is to provide a copy of all applications to Ms. Goldsmith's client for an honest and impartial review as to acceptability. Mr. Willick requested all applications sent to Ms. Goldsmith's office, not to his office. Mr. Mushkin noted his agreement.

Ms. Goldsmith confirmed she will prepare the two Reports and Recommendations since there are the two cases. Mr. Mushkin inquired if the two cases should be consolidated. Following a brief discussion, COMMISSIONER RECOMMENDED the two Trusts should be kept separate.

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PRINT DATE:	01/23/2018	Page 3 of 13	Minutes Date:	October 14, 2016

#### **DISTRICT COURT**

#### **CLARK COUNTY, NEVADA**

Probate -

**COURT MINUTES** 

January 20, 2017

Trust/Conservatorships

P-16-089638-T

In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

January 20, 2017

9:30 AM

Petition - HM

**HEARD BY:** Yamashita, Wesley

**COURTROOM:** RJC Courtroom 14C

COURT CLERK: Sharon Chun; Brynn Griffiths

**PARTIES:** 

Doan Phung, Respondent, present

L. Joe Coppedge, Attorney, present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, not present

Dara Goldsmith, Attorney, present

#### **JOURNAL ENTRIES**

- Petition for Declaratory Judgment

COMMISSIONER ADVISED that he will address the petitions for Case No. P089637 and P089638 at the same time.

COMMISSIONER NOTED a Report and Recommendation of the October hearing is now set for hearing before Judge Sturman on 2/2/17. Following arguments by Ms. Goldsmith and Mr. Mushkin, COMMISSIONER STATED he made his recommendation and does not think he should make a substantial ruling that would impact the Judge's decision and he wants to first see how the Judge rules.

COMMISSIONER RECOMMENDED, Petitions for Declaratory Judgment in Case No. P089637 and

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P089638, OFF CALENDAR; counsel may renotice.
INTERIM CONDITIONS:
FUTURE HEARINGS:

P-16-089638-T

PRINT DATE:

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Notice: Journal entries are prepared by the courtroom clerk and are not the official record of the Court.

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#### **DISTRICT COURT**

#### **CLARK COUNTY, NEVADA**

**Probate -** COURT MINUTES February 01, 2017

Trust/Conservatorships

P-16-089638-T In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

February 01, 2017 9:30 AM Motion

**HEARD BY:** Sturman, Gloria COURTROOM: RJC Courtroom 10D

**COURT CLERK:** Kory Schlitz

**PARTIES:** 

Doan Phung, Respondent, present

L. Joe Coppedge, Attorney, present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, present

Dara Goldsmith, Attorney, present

#### **JOURNAL ENTRIES**

- Upon Court's inquiry, Mr. Mushkin stated a series of allegations have been made regarding the administration of the trust and the ability for the trust to continue to be administrated. Mr. Mushkin stated that matter is in dispute and requested a 90 day Discovery period, and further requested an Evidentiary Hearing. Mr. Mushkin further requested case number P-16-089637-T and P-16-089638-T be combined, additionally requesting to combine the Petition for Declaratory Relief. Upon Court's inquiry, Mr. Mushkin stated this objection is not about money, however, is about the trustees. Ms. Goldsmith argued the Petition was filed to decant, since the parties cannot get along, stating the trust should be divided into two separate trusts. Ms. Goldsmith further stated her client cannot work with the other trustee, and argued the Commissioner did not make an error in his ruling. Ms. Mushkin argued there is no evidence that the Petitioner is afraid of the Respondent. Upon Court's inquiry, Mr. Mushkin is requesting this Court to look at the case, stating they have filed a Petition for Declaratory Relief. COURT ORDERED, Motion GRANTED IN PART, matter SENT BACK to the Probate

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Commissioner to review and clarify if there are any questions of material fact that in any way
changes the legal interpretation under the statute. Mr. Mushkin indicated he would prepare the order
and run it by opposing counsel.

**INTERIM CONDITIONS:** 

**FUTURE HEARINGS:** 

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#### **DISTRICT COURT**

#### **CLARK COUNTY, NEVADA**

Probate - COURT MINUTES April 21, 2017
Trust/Conservatorships

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P-16-089638-T In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

April 21, 2017 9:30 AM Petition - HM

HEARD BY: Yamashita, Wesley COURTROOM: RJC Courtroom 14C

COURT CLERK: Brynn Griffiths; Tena Jolley

**PARTIES:** 

Doan Phung, Respondent, not present

L. JOE COPPEDGE, Attorney, not present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, not present

Dara Goldsmith, Attorney, not present

#### **JOURNAL ENTRIES**

- Prior to the time set for hearing, COMMISSIONER RECOMMENDED, matter taken OFF CALENDAR; subject to renotice.

#### **INTERIM CONDITIONS:**

#### **FUTURE HEARINGS:**

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#### **DISTRICT COURT**

#### **CLARK COUNTY, NEVADA**

**Probate -** COURT MINUTES April 28, 2017

Trust/Conservatorships

P-16-089638-T In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

April 28, 2017 9:30 AM Petition - HM

**HEARD BY:** Yamashita, Wesley COURTROOM: RJC Courtroom 14C

**COURT CLERK:** Connie Bloom; Tena Jolley

**PARTIES:** 

Doan Phung, Respondent, present

L. JOE COPPEDGE, Attorney, present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, present

Dara Goldsmith, Attorney, present

#### **JOURNAL ENTRIES**

- - Request to Place (1) Petition to Assume in Rem Jurisdiction of Trust, Confirm Trustee and to Modify Trust and (2) Petition for Declaratory Judgment on Probate Commissioner's Calendar for Decision

COMMISSIONER NOTED that Judge Sturman's Order sent this back for him to indicate whether he has question of facts that require a hearing, or further matters, or if a matter of law or fact.

Mr. Mushkin noted that the Judge inquired if questions of fact impacted or mitigated different relief for the decanting statutes. He argued that all facts are in dispute, including material facts, and requested an evidentiary hearing scheduled.

Ms. Goldsmith argued that the NV statute enables this Court to decant. This Court has the ability to

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appoint income and principal and facts have been presented that they do not get along; the Court can consider that. Mr. Willick argued that Mr. Fung's lack of credibility should be considered.

Following additional arguments by Mr. Mushkin and Ms. Goldsmith and discussion between the Commissioner and counsels, COMMISSIONER NOTED that he has had more time to review this since first on calendar.

COMMISSIONER STATED that in both, under NRS 163 as well as the TN Annotated 35-15-816, it appears to be an absolute right vested in the Trustee. The only requirement is that I find that they have the power of invasion of principle. It does not appear anywhere to say that I have to make an associative reason why. Although it was illuminating, but not directive enough that I would have to depend on specific evidence or instances of evidence of why things may or may not be workable. It appears from both statutes, this is an absolute right of a Trustee who has that power, so I have to make that finding. That is the only finding I truly have to make; it does not affect a fixed income interest and since it is all discretionary it does not affect that. The major difference between TN and NV is that TN says "part or all" and NV just says "to a second trust". So that is the major difference and there is a question as to what that means. I believe that to make it workable and to make it fall within what I think ought to be done, she can make that determination under TN all or part and she's determined half. Under the second one it is not as clear, but the implication is that you can do a second which would require, not just the second, but two seconds and the original would be taken out. I believe that is all the material facts that I have to find.

COMMISSIONER NOTED that because he did not previously have time to review this more closely, he will amend the Report and Recommendation to state that those facts, although they may have been eliminating as to conditions, are not determining of the ultimate resolution, which is an absolute right of a Trustee that holds that power.

Mr. Mushkin requested the Court prepare the order because he has a problem with the Court ignoring the contract; these parties have a separate contract. COMMISSIONER STATED he understands that, but what he wants to see is a Report and Recommendation, as a rewrite of what he's finding and then put specifically that I feel that the issue of the irrevocability of the trust is in effect, the trust statutes come into play, and the Court is relying on the trust statutes and the ability and the rights of the Trustee, to the exclusion of the contract rights.

Ms. Goldsmith confirmed she will prepare the Report and Recommendation and run it by Mr. Mushkin.

/schun 5-5-17

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**INTERIM CONDITIONS:** 

**FUTURE HEARINGS:** 

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#### **DISTRICT COURT**

#### **CLARK COUNTY, NEVADA**

**Probate -** COURT MINUTES October 12, 2017

Trust/Conservatorships

P-16-089638-T In the Matter of the Trust of:

Fund for the Encouragement of Self Reliance

October 12, 2017 9:30 AM Objection - Probate

**HEARD BY:** Sturman, Gloria COURTROOM: RJC Courtroom 10D

COURT CLERK: Lorna Shell

**PARTIES:** 

Doan Phung, Respondent, present

L. JOE COPPEDGE, Attorney, present

Fund for the Encouragement of Self Reliance,

Trust, not present

Thu Le Doan, Petitioner, present

Dara Goldsmith, Attorney, present

#### **JOURNAL ENTRIES**

- Also present was Marshall Willick, Esq. and Peter Co, Esq. representing Thu Doan and Michael Mushkin, Esq. representing Doan Phung.

Mr. Mushkin argued the Commissioner relied on NRCP 163.556 and misapplied the statute and that a trustee does not have an absolute right to decant a trust. Mr. Mushkin further argued regarding the intent of the settlers, whether decanting reduced income, whether the trust was tax free subject to those decanting s, that it was a charitable trust registered under 501(c)(3), and that an Evidentiary Hearing should be set. Ms. Goldsmith argued there were no disputed material fact that the Commissioner failed to follow EDCR 4.17(a) and that the trustee had the right to decant. Mr. Willick argued that Thu Doan may have missed some meetings; however he was there representing her. Colloquy regarding the effect of the removal of a trustee. Mr. Mushkin argued Ms. Doan signed a contract agreeing her discretion was less than \$5,000 to decant. Mr. Mushkin further argued

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regarding what discretion Ms. Doan had as trustee.	COURT STATED FINDINGS and ORDERED,
Objection DENIED as there was no error in the rulin	ng by the Commissioner.

**INTERIM CONDITIONS:** 

**FUTURE HEARINGS:** 

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### EIGHTH JUDICIAL DISTRICT COURT CLERK'S OFFICE NOTICE OF DEFICIENCY ON APPEAL TO NEVADA SUPREME COURT

MICHAEL R. MUSHKIN, ESQ. 4475 S. PECOS RD. LAS VEGAS, NV 89121

> **DATE: January 23, 2018** CASE: P-16-089638-T

RE CASE: In the Matter of the Trust of: FUND FOR THE ENCOURAGEMENT OF SELF

**RELIANCE** 

NOTICE OF APPEAL FILED: January 19, 2018

YOUR APPEAL HAS BEEN SENT TO THE SUPREME COURT.

PLEASE NOTE: DOCUMENTS **NOT** TRANSMITTED HAVE BEEN MARKED:

$\boxtimes$	\$250 – Supreme Court Filing Fee (Make Check Payable to the Supreme Court)**
	- If the \$250 Supreme Court Filing Fee was not submitted along with the original Notice of Appeal, it is

- mailed directly to the Supreme Court. The Supreme Court Filing Fee will not be forwarded by this office if submitted after the Notice of Appeal has been filed.
- \$24 District Court Filing Fee (Make Check Payable to the District Court)\*\*
- \$500 Cost Bond on Appeal (Make Check Payable to the District Court)\*\*  $\boxtimes$ 
  - NRAP 7: Bond For Costs On Appeal in Civil Cases
- Case Appeal Statement
  - NRAP 3 (a)(1), Form 2
- Order

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Notice of Entry of Order 

#### NEVADA RULES OF APPELLATE PROCEDURE 3 (a) (3) states:

"The district court clerk must file appellant's notice of appeal despite perceived deficiencies in the notice, including the failure to pay the district court or Supreme Court filing fee. The district court clerk shall apprise appellant of the deficiencies in writing, and shall transmit the notice of appeal to the Supreme Court in accordance with subdivision (e) of this Rule with a notation to the clerk of the Supreme Court setting forth the deficiencies. Despite any deficiencies in the notice of appeal, the clerk of the Supreme Court shall docket the appeal in accordance with Rule 12."

Please refer to Rule 3 for an explanation of any possible deficiencies.

<sup>\*\*</sup>Per District Court Administrative Order 2012-01, in regards to civil litigants, "...all Orders to Appear in Forma Pauperis expire one year from the date of issuance." You must reapply for in Forma Pauperis status.

## **Certification of Copy**

State of Nevada
County of Clark

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; DISTRICT COURT DOCKET ENTRIES; CIVIL COVER SHEET; ORDER DENYING RESPONDENT, DOAN L. PHUNG'S OBJECTION TO PROBATE COMMISSIONER'S REPORT AND RECOMMENDATION AND ORDER GRANTING TRUSTEE THU-LE DOAN TO DECANT THE ASSETS OF THE FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE AKA CENTER FOR THE ENCOURAGEMENT OF RELIANCE PURSUANT TO NRS 163.556; NOTICE OF ENTRY OF ORDER DENYING RESPONDENT, DOAN L. PHUNG'S OBJECTION TO PROBATE COMMISSIONER'S REPORT AND RECOMMENDATION AND ORDER GRANTING TRUSTEE THU-LE DOAN TO DECANT THE ASSETS OF THE FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE AKA CENTER FOR THE ENCOURAGEMENT OF RELIANCE PURSUANT TO NRS 163.556; DISTRICT COURT MINUTES; NOTICE OF DEFICIENCY

In the Matter of the Trust of:

FUND FOR THE ENCOURAGEMENT OF SELF RELIANCE

Case No: P-16-089638-T

Dept No: XXVI

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 23 day of January 2018.

Steven D. Grierson, Clerk of the Court

Amanda Hampton, Deputy Clerk