

SUMMARY STATEMENT

Nelson v. Wylie

Docket No. 52008-2025

Larry Nelson and Glenna Mae Wylie-Nelson were married for 35 years. She owned a home in Priest River, Idaho, which was her separate property, where they both lived throughout their marriage. When Glenna Mae passed away in 2022, her Will conveyed the home to her son, Leslie Wylie, but reserved a life estate for Larry. The Will provided that the house could only be sold during Larry's life if both Larry and Leslie agreed to the sale. Larry approached Leslie to sell the home, but Leslie declined. While the probate of Glenna Mae's estate was proceeding, Larry filed a separate action for judicial proceedings under the Trust and Estate Dispute Resolution Act ("TEDRA"), seeking a declaration of rights and a partition by sale of the home to recover his community property portion of the property. The district court dismissed Larry's petition based on its conclusion that it lacked subject matter jurisdiction over his claims under TEDRA. The district court also denied his motion for leave to amend his petition and awarded attorney fees to the Estate and Leslie. Larry appealed.

On appeal, the Idaho Supreme Court held that the district court erred in dismissing Larry's petition for a lack of jurisdiction. It explained that the plain language of TEDRA grants district courts broad jurisdiction to resolve trust and estate matters. Under TEDRA, a "matter" is defined as "[t]he determination of any question arising in the administration of an estate . . . or with respect to any other asset or property interest passing at death" I.C. § 15-8-103(1)(c). The questions of whether Larry had a property interest in the home and, if so, the extent of that interest, were questions with respect to an "asset or property interest passing at death"; thus, they fit squarely with the purview of TEDRA. Consequently, the trial court was mistaken when it dismissed Larry's petition for lack of jurisdiction.

The Idaho Supreme Court then held that the district court further erred in denying Larry's motion for leave to amend his original petition. Under the liberal standard contained in I.R.C.P. 15 for granting leave, the district court failed to act "consistently with the legal standards applicable to the specific choices available to it" in denying Larry's motion. The Court further held that because the district court's award of attorney fees was based on its improper dismissal of Larry's petition and the denial of his motion for leave to amend, it erred in awarding attorney fees to the Estate and Leslie under Idaho Code section 12-121 and section 15-8-208.

******This summary constitutes no part of the opinion of the Court, but has been prepared by court staff for the convenience of the public.******