

Attachment 1  
**PRETRIAL & SETTLEMENT CONFERENCE STATEMENT**  
**( NOT FOR PUBLIC VIEW )**

**\*\* THIS DOCUMENT WILL BE PROVIDED TO THE CLERK AND  
NOT FILED IN ACCORDANCE WITH L.R. 5.7**

**CASE NAME:** \_\_\_\_\_ vs. \_\_\_\_\_

**ACTION NO.:** \_\_\_\_\_

**ASSIGNED JUDGE:** \_\_\_\_\_

**ASSIGNED MAGISTRATE JUDGE:** \_\_\_\_\_

Each Attorney is required to submit the following information on behalf of his or her client in short, concise form, in order to present a brief overview of the facts of the case. This information will be used by the Court during the scheduled final pretrial/settlement conference and therefore, **must be provided to the Court five (5) days in advance of the conference date.**

**PARTY/PARTIES REPRESENTED:**

---

---

---

---

---

---

---

---

(use additional page if necessary)

**A BRIEF PERSONAL HISTORY REGARDING YOUR CLIENT(S):**

---

---

---

---

---

---

---

---

(use additional page if necessary)

**A BRIEF STATEMENT OF THE FACTS OF THE CASE:**

---

---

---

---

---

---

---

---

(use additional page if necessary)

**A BRIEF STATEMENT OF THE CLAIMS AND DEFENSES, i.e., STATUTORY OR OTHER GROUNDS UPON WHICH THE CLAIMS ARE FOUND; AN EVALUATION OF THE PARTIES' LIKELIHOOD OF PREVAILING ON THE CLAIMS AND DEFENSES; AND A DESCRIPTION OF THE MAJOR ISSUES IN DISPUTE. SET FORTH ANY DEMANDS OR OFFERS FOR SETTLEMENT**

---

---

---

---

---

---

---

---

(use additional page if necessary)

**A SUMMARY OF THE PROCEEDINGS TO DATE:**

---

---

---

---

---

---

---

---

(use additional page if necessary)

**AN ESTIMATE OF THE COST AND TIME TO BE EXPENDED FOR FURTHER DISCOVERY, PRETRIAL AND TRIAL:**

---

---

---

---

---

(use additional page if necessary)

**A BRIEF STATEMENT OF THE FACTS AND ISSUES UPON WHICH THE PARTIES AGREE:**

---

---

---

---

---

(use additional page if necessary)

**ANY DISCREET ISSUES WHICH, IF RESOLVED, WOULD AID IN THE DISPOSITION OF THE CASE:**

---

---

---

---

---

(use additional page if necessary)

**THE RELIEF SOUGHT:**

---

---

---

---

---

(use additional page if necessary)

**THE PARTIES' POSITION ON SETTLEMENT, INCLUDING PRESENT DEMANDS AND OFFERS, THE HISTORY OF PAST SETTLEMENT DISCUSSIONS, OFFERS AND DEMANDS:**

---

---

---

---

---

---

---

---

---

---

(use additional page if necessary)

**PREFERRED TRIAL LOCATION, APPROXIMATE LENGTH OF TRIAL, AND WHETHER TRIAL IS JURY OR NON-JURY:**

---

---

---

---

The Court requires that each party be represented at each pretrial conference by an attorney who has the authority to bind that party regarding all matters identified by the Court for discussion at the conference and all reasonably related matters including settlement authority.

This document will not be filed and will not be made available for public view.

Should the case be settled in advance of the settlement conference date, counsel are required to notify the court immediately. Failure to do so could subject counsel for all parties to sanctions.

Signature of Counsel:

---

Dated: \_\_\_\_\_