

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): TELEPHONE NO.: _____ FAX NO. (Optional): _____ ATTORNEY FOR (Name): _____	FOR COURT USE ONLY
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO <input type="checkbox"/> CENTRAL DIVISION, CENTRAL COURTHOUSE, 1100 UNION ST., SAN DIEGO, CA 92101 <input type="checkbox"/> CENTRAL DIVISION, MADGE BRADLEY, 1409 4TH AVE., SAN DIEGO, CA 92101	
PETITIONER(S)	
RESPONDENT(S)	
CASE TITLE IN RE	
CASE MANAGEMENT STATEMENT	CASE NUMBER

A CASE MANAGEMENT CONFERENCE is scheduled as follows:				
Date:	Time:	Dept.:	Div.: Probate	Room:
Address of court (if different from the address above):				
<input type="checkbox"/> Notice of Intent to Appear by Telephone, by (name):				

INSTRUCTIONS: All applicable boxes must be checked, and the specified information must be provided.

1. **Party or parties** (answer one):
 - a. This statement is submitted by party (name):
 - b. This statement is submitted **jointly** by parties (names):

2. **Pending Petition(s)** (to be answered by petitioner(s) only)
 - a. Name of Petition and ROA (Register of Action) number:
 - b. Petition was filed on (date):
 - c. The response/objections to Petition, if any, was/were filed on (date):
 - d. (For additional petitions, and corresponding response/objections, if any, check this box and attach a page designated as Attachment 2d.)

3. **Notice** (to be answered by petitioner(s) only)
 - a. All parties required to receive notice under the Probate Code have received the required notice.
 - b. The parties named in petition and other persons required to be noticed have not been served (specify names and explain why not):
 - c. Attorney General has been served.
 - d. All lienholders have been served.
 - e. Bonding company has been served.

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4. Description of case

a. Provide a brief statement of the case:

b. Estimated damages or amount at issue. *(If damages are sought, specify damages claimed. If equitable relief is sought, describe the nature of the relief.)*:

c. Identify all legal issues for resolution by the court:

d. Identify all material factual issues:

e. Prayer for relief:

f. Brief statement of parties' position:

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5. Jury or nonjury trial

The party or parties request a jury trial nonjury trial. (If more than one party, provide the name of each party requesting a jury trial):

6. Trial date

- a. The trial has been set for (date):
- b. Date parties anticipate case will be ready for trial:
- c. No trial date has been set.
- d. Dates on which parties or attorneys will not be available for trial (specify dates and explain reasons for unavailability):
- e. Parties are willing to stipulate to a temporary judge for trial.

7. Estimated length of trial

The party or parties estimate that the trial will take (check one):

- a. days (specify number):
- b. hours (short causes) (specify):
- c. number of anticipated witnesses:
- d. number of expert witnesses:

8. Preference

This case is entitled to preference (specify code section):

9. Alternative Dispute Resolution

The party or parties are willing to participate in (check all that apply):

- (1) Mediation
- (2) Early settlement conference (specify when):
- (3) Other (specify):

10. Jurisdiction

Indicate any matters that may affect the court's jurisdiction or processing of this case, and describe the status.

Appeal Bankruptcy Other (specify):

Status:

11. Related cases, consolidation, and coordination

- a. There are companion, underlying, or related cases.
 - (1) Name of case:
 - (2) Name of court:
 - (3) Case number:
 - (4) ROA number, if applicable:
 - (5) Status of Related Case(s):
- b. Additional cases are described in Attachment 11a.
- b. A motion to consolidate coordinate will be filed by (name party):

12. Bifurcation

The party or parties intend to request an order bifurcating, severing, or coordinating the following issues or causes of action (specify moving party, type of motion, and reasons):

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13. **Other motions**

The party or parties expect to file the following motions before trial (*specify moving party, type of motion, and issues*):

14. **Discovery**

a. The party or parties have completed all discovery.

b. The following discovery will be completed by the date specified (*describe all anticipated discovery*):

<u>Party</u>	<u>Description</u>	<u>Date</u>
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c. The following discovery issues are anticipated (*specify*):

d. Proposed discovery cut off date:

15. **Other issues**

The party or parties request that the following additional matters be considered or determined at the case management conference (*specify*):

16. **Meet and confer**

a. The party or parties have met and conferred with all parties on all subjects required by rule 3.724 of the California Rules of Court (*if not, explain*):

b. After meeting and conferring as required by rule 3.724 of the California Rules of Court, the parties agree on the following (*specify*):

17. Total number of pages attached (if any) including any attachment necessary for additional signatures on the Statement. _____

I am completely familiar with this case and will be fully prepared to discuss the status of discovery and ADR, as well as other issues raised by this statement.

Date: _____

Type or print name

Signature of Party or Attorney

Date: _____

Type or print name

Signature of Party or Attorney

Additional signatures are attached