

SCHEDULING ORDER
JD-CV-71 Rev. 1-10

CONNECTICUT JUDICIAL BRANCH
SUPERIOR COURT
www.jud.ct.gov



Instructions

1. Complete all sections and file with the clerk.
2. All counsel and self-represented parties of record must sign the fully completed form and keep a copy for their records.

Judicial District of Stamford	Conference date (if known) 10/29/15	Docket number FST-CV-155014808-S
Name of case William A. Lomas v. Partner Wealth Management, LLC et al.		

Alternate Dispute Resolution

Have the parties discussed alternative dispute resolution methods (ADR), including court-annexed mediation, binding arbitration, and private mediation?

Are all parties willing to refer the case to **PRIVATE ADR**?

Are there reasons why this case should be referred to the Complex Litigation Docket (CLD)?

In court cases, are the parties willing to try the case before an **ATTORNEY TRIAL REFEREE**?

In jury cases, are the parties willing to try the case (with a jury) before a **JUDGE TRIAL REFEREE**?

- | | |
|---|--|
| <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |

Discovery Order

By order of the Presiding Judge, the following discovery order is entered. A party who does not follow this order may be sanctioned by having to pay a fine; having proposed evidence excluded at trial; having the case dismissed; being defaulted or non-suited; or other sanctions.

1. File Certificate of Closed Pleadings (JD-CV-11) by (date): 12/1/2015
2. Exchange written discovery requests by (date): 10/30/2015
3. Exchange responses to discovery requests by (date): 12/18/2015
4. Any dispositive motions, including motions for summary judgment, shall be filed by: (at least 8 months before trial) 5/13/2016
Responses to dispositive motions shall be filed by (date): 6/13/2016
5. Dispositive motions shall be marked ready on the short calendar no later than (date): ~~4/18/2016~~ 7/1/13
6. Disclose
Plaintiff's experts by (date): 2/1/2016 Defendant's experts by (date): 4/1/2016
7. Complete depositions of
Fact witnesses by (date): 5/2/2016
Plaintiffs by (date): 5/2/2016 Defendants by (date): 5/2/2016
Plaintiff's experts by (date): 3/1/2016 Defendant's experts by (date): 5/2/2016

Note: The Court will not act on a request for a continuance based on incomplete discovery unless the parties have followed the Standing **Discovery and Deposition Dispute Order** which may be viewed on the Judicial Branch website at www.jud.ct.gov/external/super/StandOrders/discovery.htm.

8. For jury cases only: The verdict will likely be more than \$50,000 less than \$50,000
9. Finish Independent Medical Exam(s) (I.M.E.) by (date): N/A
10. Is there a case that should be consolidated with this one? Yes No Docket number: _____
11. Motion to consolidate this case with the below-named case is to be filed and marked ready by (date): N/A

Docket number	Name of case to consolidate with
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12. When will this case be ready for a meaningful settlement conference? 2/1/2016
13. Other scheduling orders:

14. Other Orders:

JMC: 10/20/2016 @ 2:00pm
Jrd: 11/7/2016

Counsel and all self-represented parties of record should indicate a date for pretrial, however it will still be subject to review by the court. Counsel and self-represented parties will be notified of the date and time scheduled for pretrial.

15. Give 3 dates when all parties are available to start the trial: 1. 10/27/2016 2. 11/10/2016 3. 11/17/2016
16. A pretrial conference will be held in this case on or about (date): 11/21/2016

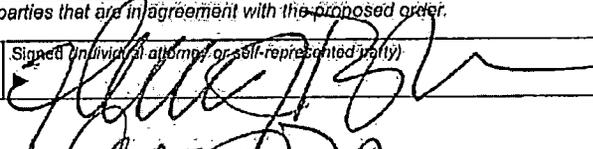
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130.00

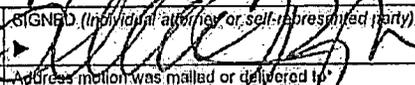
Agreement

Name of attorney/Self-represented party* Thomas J. Rechen, Esq. for Plaintiff	Name of attorney/Self-represented party* David R. Lagasse, Esq. for Defendants
Name of attorney/Self-represented party*	Name of attorney/Self-represented party* Richard J. Buturla, Esq. for Defendants
Name of attorney/Self-represented party*	Name of attorney/Self-represented party*
Name of attorney/Self-represented party*	Name of attorney/Self-represented party*

* If necessary, attach additional sheet with names of counsel/self-represented parties that are in agreement with the proposed order.

I certify that this proposed order has been agreed to by all counsel and self-represented parties of record.	Signed (Individual attorney or self-represented party) 
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Certification

I certify that a copy of this motion was mailed or delivered to all counsel and self-represented parties in the case on:	DATE 10/23/15	SIGNED (Individual attorney or self-represented party) 	Phone number (area code first) 860-275-6706
Name of each party motion was mailed or delivered to* David R. Lagasse, Esq. Richard J. Buturla, Esq.		Address motion was mailed or delivered to* Mintz Levin Cohn Ferris Glovsky & Popeo, P.C., 666 Third Avenue, New York, NY 10017	
		Berchem, Moses & Devlin, P.C., 75 Broad Street, Milford, CT 06460	

* If necessary, attach additional sheet with the names of each party motion was mailed or delivered to and the address motion was mailed or delivered to.

Order (For Court Use Only)

The above proposed order having been considered, it is HEREBY ORDERED:

<input checked="" type="checkbox"/> Granted	<input type="checkbox"/> Denied	Signed (Judge) (Heller, J.) <i>Andrew C. Perry, JAC</i>	Date issued 10/29/2015
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The Judicial Branch of the State of Connecticut complies with the Americans with Disabilities Act (ADA). If you need a reasonable accommodation in accordance with the ADA, contact the court clerk of the Judicial District on the front/page 1 of this form. www.jud.ct.gov/ADA/