PRETRIAL CONFERENCE CHECKLIST
DIVISION _____ – JUDGE _____
(Pursuant to Fla. R. Civ. P. 1.200(d))

CASE NO.: _____	**PTC DATE**: _____
CASE STYLE: Plaintiff: (1):_____ (2):_____ (3):_____	Defendant(s): (1):_____ (2):_____ (3):_____
TRIAL ATTORNEY(s) FOR: Plaintiff: (1):_____ (2):_____ (3):_____	**TRIAL ATTORNEY(s) FOR**: Defendant(s): (1):_____ (2):_____ (3):_____

Date Order Setting Trial:	Date CMO Entered:	CMO Projected Trial Date:
_____	_____	_____
Trial Length: _____(days/weeks)	**Jury Trial**: ☐ Yes ☐ No	
Continued from Prior Docket? : ☐ Yes ☐ No. Date last trial docket: _____		
Has **Mediation** been held? ☐ Yes ☐ No If no, when is it scheduled? Is **Settlement** still a possibility? ☐ Yes ☐ No ☐ Maybe		

1	**Pretrial Meeting of Counsel** completed? ☐ Yes ☐ No If no, when scheduled? _____	**Joint Pretrial Stipulation ("JPTS")** filed? ☐ Yes ☐ No If no, when filed? _____

2	Do the parties have a **Statement of the Case** to be read to venire: ☐ Yes ☐ No Statement of Case in JPTS? ☐ Yes ☐ No

3	Have typed proposed **Jury Instructions** and **Verdict Forms** been submitted to the Court prior to the Pre-Trial Conference? ☐ Yes ☐ No If no, when will the **jury instructions** and **verdict forms** be filed with the Clerk and submitted to the Court? _____

4	Will early **Substantive Jury Instructions**, including the law be given **prior** to **Opening Statement**? ☐ Yes ☐ No

5	Are there any objections or concerns to **Jurors** taking **notes** and asking **questions** of witnesses (See Section 40.50, Florida Statutes and Rule 1.452, Fl. R. Civ. Pr.)? ☐ Yes ☐ No

6	How many prospective **Jurors** are requested for the **Venire**? _____ **Peremptory Challenges** in the selection of the Jurors: Plaintiff (1) _____ Defendant (1) _____ Plaintiff (2) _____ Defendant (2) _____

7	Number of **Alternate Jurors** to be impaneled? _____ **Peremptory Challenges** in the selection of the Alternate Juror(s): Plaintiff (1) _____ Defendant (1) _____ Plaintiff (2) _____ Defendant (2) _____

	Time Estimates	*Voir Dire* (If Jury Trial)	Opening Statement	Case in Chief	Closing Argument
8	Plaintiff (1)	_____ min _____ hr.	_____ min _____ hr	_____ min _____ hr	_____ min _____ hr
	Plaintiff (2)	_____ min _____ hr	_____ min _____ hr	_____ min _____ hr.	_____ min _____ hr.
	Defendant (1)	_____ min _____ hr	_____ min _____ hr.	_____ min _____ hr	_____ min _____ hr
	Defendant (2)	_____ min _____ hr	_____ min _____ hr	_____ min _____ hr	_____ min _____ hr
	Total Estimated Time for Trial: _____ days/weeks				

9	When is the **Rule of Sequestration** invoked? ☐ Before *voir dire* ☐ Before opening ☐ Not invoked

10	**Court Reporter:** ☐ Plaintiff ☐ Defendant ☐ Shared ☐ None **Interpreter:** ☐ Plaintiff ☐ Defendant ☐ Shared ☐ None

11	Are all **Exhibits** to be introduced and offered into evidence during trial pre-marked for identification with letters, or numbers for admission into evidence by stipulation, corresponding to the Exhibit Log given to the Trial Clerk? Plaintiff (1): ☐ Yes ☐ No If no, when? _____ Defendant (1): ☐ Yes ☐ No If no, when? _____ Defendant (2): ☐ Yes ☐ No If no, when? _____

12		Witness List Filed?	Exhibit List Filed?	Expert List Filed?	All Lists in JPTS?
	Plaintiff (1):	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	Defendant (1):	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	Defendant (2):	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

13	Have **all Demonstrative Aids,** charts, boards, illustrations, maps, diagrams and PowerPoint slides or presentations (to be used during Opening Statement or Trial) been pre-marked for identification only with letters corresponding to the Exhibit Log given to the Trial Clerk, exchanged or otherwise made available to opposing counsel to evaluate and review to allow for objections to be noted, brought to the Court's attention and ruled on **PRIOR** to the first day of trial? *NOTE: DEMONSTRATIVE AIDS MAY NOT BE USED DURING OPENING STATEMENT WITHOUT AGREEMENT OR PRIOR COURT ORDER.* Plaintiff (1): ☐ Yes ☐ No If no, when? _____ Defendant (1) ☐ Yes ☐ No If no, when? _____ Defendant (2): ☐ Yes ☐ No If no, when? _____

14	Have all **Rule 1.360 Examinations** been completed? ☐ Yes ☐ No If no, describe generally what examination(s) are pending and the anticipated completion date?_____ _____ _____ _____ _____

15	Have all **Motions to Amend Pleadings** been filed and heard? ☐ Yes ☐ No If no, identify any such pending motion(s) and whether they were timely filed: <u>Timely Filed?</u> 1. _____ ☐ Yes ☐ No 2. _____ ☐ Yes ☐ No 3. _____ ☐ Yes ☐ No

16	Has all **fact discovery** been completed? ☐ Yes ☐ No If no, describe generally what **discovery** is pending and when it will be completed? _____ _____ _____

17	Has all **expert discovery** been completed? ☐ Yes ☐ No If no, describe generally what expert discovery is pending and when it will be completed?_____ _____ _____ _____

18	Have all **Dispositive Motions and Summary Judgment Motions** been filed and heard including but not limited to, the defense of "failure to state a cause of action" pursuant to Rule 1.140(h)(2)? ☐ Yes ☐ No If no, identify any such pending motion(s) and whether they were timely filed: <u>Timely Filed?</u> 1. _____ ☐ Yes ☐ No 2. _____ ☐ Yes ☐ No 3. _____ ☐ Yes ☐ No

| 19 | Have all *Daubert* or other **Expert Witness Related Motions** been filed and heard?
☐Yes ☐No

If no, identify any such pending motion(s) and whether they were timely filed:

                                           <u>Timely Filed?</u>
  1. _____ ☐ Yes ☐ No
  2. _____ ☐ Yes ☐ No
  3. _____ ☐ Yes ☐ No |

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Have all *Daubert* or other **Expert Witness Related Motions** been filed and heard?
☐Yes ☐No

If no, identify any such pending motion(s) and whether they were timely filed:

<u>Timely Filed?</u>

1. _____ ☐ Yes ☐ No
2. _____ ☐ Yes ☐ No
3. _____ ☐ Yes ☐ No

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Have all *Northrup* **Impeachment Materials** been identified, disclosed and exchanged?
☐ Yes ☐ No
If no, when will such materials be identified, disclosed and exchanged?

_____

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Have all **case specific Motions in *Limine*** been filed and heard? ☐ Yes ☐ No

If no, identify any such pending motion(s) and whether they were timely filed:

<u>Timely Filed?</u>

1. _____ ☐ Yes ☐ No
2. _____ ☐ Yes ☐ No
3. _____ ☐ Yes ☐ No

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Have all **Deposition Transcripts, Answers to Interrogatories, and Responses to Request(s) for Admissions** been filed with the Court if they are to be published during the case in chief or used for impeachment?

Plaintiff (1): ☐ Yes ☐ No   If no, when? _____
Defendant (1): ☐ Yes ☐ No   If no, when? _____

23	Have all **Deposition Designations**, **Counter Designations, objections and completeness concerns** been timely exchanged in writing? ☐ Yes ☐ No If no, when will such **deposition designations, objections, and completeness concerns** be exchanged? _____

24	Have all **Stipulations, Admissions, Agreements** and **Waivers** been reduced to writing and incorporated in the Joint Pretrial Stipulation? ☐ Yes ☐ No If no, when will they be prepared and filed? _____ *NOTE: STIPULATIONS, ADMISSIONS, AGREEMENTS AND WAIVERS MUST BE IN WRITING IF SEEKING COURT ENFORCEMENT.*

25	Are there any **other pending motion(s), special provisions, accommodations, or concerns** not previously identified above? ☐ Yes ☐ No If yes, identify any such **pending motion(s), special provisions, accommodations, or concerns:** Timely Filed? 1. _____ ☐ Yes ☐ No 2. _____ ☐ Yes ☐ No 3. _____ ☐ Yes ☐ No

26	Are there any pending written **Request(s) for Judicial Notice** with timely notice to adverse parties, proof of which is filed with the Court? ☐ Yes ☐ No If yes, identify any such pending Request(s): Timely Filed? 1. _____ ☐ Yes ☐ No 2. _____ ☐ Yes ☐ No 3. _____ ☐ Yes ☐ No *NOTE: ANY PARTY REQUESTING JUDICIAL NOTICE MUST FOLLOW THE EVIDENCE CODE, Section 90.201-90.207, Florida Statutes.*

27	Do you intend to use the Court's **Courtroom Technology** and/or **Audio/Video** equipment during the trial? ☐ Yes ☐ No
	
	If you intend to use the Court's **Courtroom Technology** and/or **Audio/Video** equipment have you:
	  1. Reviewed the Court Technology page and request form on the Circuit's webpage at: *https:flcourts18.org/court-programs/information-technology/* ?
	      Plaintiff ☐ Yes ☐ No Defendant ☐ Yes ☐ No
	  2. Met and conferred to identify any fact and/or expert witnesses who will be testifying via Microsoft Teams? ☐ Yes ☐ No
	
	If yes, are there any Motions(s)/Objection(s) to be heard related to such Teams testimony ("No" constitutes a stipulation/consent to the same)? ☐ Yes ☐ No

28	Do the Parties understand that the Court expects them to **disclose** the next day's **witnesses** at the end of each court day? ☐ Yes ☐ No

29	**Trial Briefs** are not required, however, do the parties understand that if you choose to submit them, courtesy hard *and* electronic copies must be delivered to the Judge's chambers at least **three (3) business days** before trial to allow time for review? ☐ Yes ☐ No

30	Have you reviewed and familiarized yourselves with the Judge's **Procedures**, **Guidelines** and "**Trial Conduct and Courtroom Decorum Policy**", all of which can be found on the Court's website, *https://flcourts18.org/attorney-citizen-resources/attorney-resources/* ? ☐ Yes ☐ No

[***Signature Block and Certification for Attorneys Follows on Next Page***]

ATTORNEY SIGNATURES AND CERTIFICATION

By our signatures below, we have read and acknowledge the foregoing and understand duties, responsibilities and obligations related to preparing for and conducting the trial of the above-styled cause. We understand that we must notify the Court immediately upon settlement of the case.

Signatures:

Attorney(s) for Plaintiff(s)

Signature _____   for _____(1)
Printed Name _____

Signature _____   for _____(2)
Printed Name _____

Attorney(s) for Defendant(s)

Signature _____   for _____(1)
Printed Name _____

Signature _____   for _____(2)
Printed Name _____

Signature _____   for _____(3)
Printed Name _____

Signature _____   for _____(4)
Printed Name _____

Signature _____   for _____(5)
Printed Name _____