

PRETRIAL CONFERENCE CHECKLIST

JUDGE:

(Pursuant to Fla. R. Civ. P. 1.200(k))

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: <input type="checkbox"/> Yes <input type="checkbox"/> No
Continued from Prior Docket? : <input type="checkbox"/> Yes <input type="checkbox"/> No. Date last trial docket: _____		
Has Mediation been held? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when is it scheduled?		
Is Settlement still a possibility? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe		

1	Pretrial Meeting of Counsel completed? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when scheduled? _____	Joint Pretrial Stipulation (“JPTS”) filed? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when filed? _____
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2	<p>Do the parties have a Statement of the Case to be read to venire: <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Statement of Case in JPTS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
3	<p>Have typed proposed Jury Instructions and Verdict Forms been submitted to the Court prior to the Pre-Trial Conference? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will the jury instructions and verdict forms be filed with the Clerk and submitted to the Court? _____</p>
4	<p>Will early Substantive Jury Instructions, including the law be given prior to Opening Statement? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
5	<p>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.)?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
6	<p>How many prospective Jurors are requested for the Venire? _____</p> <p>Peremptory Challenges in the selection of the Jurors:</p> <p>Plaintiff (1) _____ Defendant (1) _____</p> <p>Plaintiff (2) _____ Defendant (2) _____</p>
7	<p>Number of Alternate Jurors to be impaneled? _____</p> <p>Peremptory Challenges in the selection of the Alternate Juror(s):</p> <p>Plaintiff (1) _____ Defendant (1) _____</p> <p>Plaintiff (2) _____ Defendant (2) _____</p>

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

9	When is the Rule of Sequestration invoked? <input type="checkbox"/> Before <i>voir dire</i> <input type="checkbox"/> Before opening <input type="checkbox"/> Not invoked
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10	Court Reporter: <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant <input type="checkbox"/> Shared <input type="checkbox"/> None Interpreter: <input type="checkbox"/> Plaintiff <input type="checkbox"/> Defendant <input type="checkbox"/> Shared <input type="checkbox"/> None
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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): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____ Defendant (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____ Defendant (2): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____
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		Witness List Filed?	Exhibit List Filed?	Expert List Filed?	All Lists in JPTS?
12	Plaintiff (1):	<input type="checkbox"/> Yes <input type="checkbox"/> No			
	Defendant (1):	<input type="checkbox"/> Yes <input type="checkbox"/> No			
	Defendant (2):	<input type="checkbox"/> Yes <input type="checkbox"/> No			

13	<p>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?</p> <p>NOTE: DEMONSTRATIVE AIDS MAY NOT BE USED DURING OPENING STATEMENT WITHOUT AGREEMENT OR PRIOR COURT ORDER.</p> <p>Plaintiff (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p> <p>Defendant (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p> <p>Defendant (2): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p>
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14	<p>Have all Rule 1.360 Examinations been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what examination(s) are pending and the anticipated completion date? _____ _____ _____</p>
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15	<p>Have all Motions to Amend Pleadings been filed and heard? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <p>1. _____ <u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>2. _____ <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>3. _____ <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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16	<p>Has all fact discovery been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what discovery is pending and when it will be completed?</p> <hr/> <hr/> <hr/>
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17	<p>Has all expert discovery been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, describe generally what expert discovery is pending and when it will be completed? _____</p> <p>_____</p> <p>_____</p> <p>_____</p>
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18	<p>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)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 70%;">1. _____</td> <td style="width: 30%; text-align: right; vertical-align: bottom;"><u>Timely Filed?</u></td> </tr> <tr> <td>2. _____</td> <td style="text-align: right; vertical-align: bottom;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td>3. _____</td> <td style="text-align: right; vertical-align: bottom;"><input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> </table>	1. _____	<u>Timely Filed?</u>	2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
1. _____	<u>Timely Filed?</u>						
2. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						
3. _____	<input type="checkbox"/> Yes <input type="checkbox"/> No						

	<p>Have all <i>Daubert</i> or other Expert Witness Related Motions been filed and heard? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <p>19 1. _____</p> <p>2. _____</p> <p>3. _____</p> <p style="text-align: right;"><u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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	<p>20 Have all <i>Northrup Impeachment Materials</i> been identified, disclosed and exchanged? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will such materials be identified, disclosed and exchanged? _____</p>
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	<p>21 Have all case specific Motions in Limine been filed and heard? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, identify any such pending motion(s) and whether they were timely filed:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p style="text-align: right;"><u>Timely Filed?</u> <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
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	<p>22 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?</p> <p>Plaintiff (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p> <p>Defendant (1): <input type="checkbox"/> Yes <input type="checkbox"/> No If no, when? _____</p>
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23	<p>Have all Deposition Designations, Counter Designations, objections and completeness concerns been timely exchanged in writing? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will such deposition designations, objections, and completeness concerns be exchanged? _____</p>
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24	<p>Have all Stipulations, Admissions, Agreements and Waivers been reduced to writing and incorporated in the Joint Pretrial Stipulation? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, when will they be prepared and filed? _____</p> <p><i>NOTE: STIPULATIONS, ADMISSIONS, AGREEMENTS AND WAIVERS MUST BE IN WRITING IF SEEKING COURT ENFORCEMENT.</i></p>
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25	<p>Are there any other pending motion(s), special provisions, accommodations, or concerns not previously identified above? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, identify any such pending motion(s), special provisions, accommodations, or concerns:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p style="text-align: right;"><u>Timely Filed?</u></p> <table style="margin-left: 20px;"> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> </table>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No						
<input type="checkbox"/> Yes	<input type="checkbox"/> No						
<input type="checkbox"/> Yes	<input type="checkbox"/> No						

26	<p>Are there any pending written Request(s) for Judicial Notice with timely notice to adverse parties, proof of which is filed with the Court? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, identify any such pending Request(s):</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p style="text-align: right;"><u>Timely Filed?</u></p> <table style="margin-left: 20px;"> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> <tr> <td><input type="checkbox"/> Yes</td> <td><input type="checkbox"/> No</td> </tr> </table> <p><i>NOTE: ANY PARTY REQUESTING JUDICIAL NOTICE MUST FOLLOW THE EVIDENCE CODE, Section 90.201-90.207, Florida Statutes.</i></p>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No						
<input type="checkbox"/> Yes	<input type="checkbox"/> No						
<input type="checkbox"/> Yes	<input type="checkbox"/> No						

27	<p>Do you intend to use the Court's Courtroom Technology and/or Audio/Video equipment during the trial? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If you intend to use the Court's Courtroom Technology and/or Audio/Video equipment have you:</p> <ol style="list-style-type: none"> 1. Reviewed the Court Technology page and request form on the Circuit's webpage at: https://flcourts18.org/court-programs/information-technology/? Plaintiff <input type="checkbox"/> Yes <input type="checkbox"/> No Defendant <input type="checkbox"/> Yes <input type="checkbox"/> No 2. Met and conferred to identify any fact and/or expert witnesses who will be testifying via Microsoft Teams? <input type="checkbox"/> Yes <input type="checkbox"/> No <p>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)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
28	<p>Do the Parties understand that the Court expects them to disclose the next day's witnesses at the end of each court day? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
29	<p>Trial Briefs are not required, however, do the parties understand that if you choose to submit them, courtesy hard <i>and</i> electronic copies must be delivered to the Judge's chambers at least three (3) business days before trial to allow time for review? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
30	<p>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/?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

[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 _____