

Commonwealth of Massachusetts

The Trial Court

Division \_\_\_\_\_

Probate and Family Court Department

Docket No. \_\_\_\_\_

**REQUEST FOR A CASE MANAGEMENT CONFERENCE**

\_\_\_\_\_, Plaintiff

V.

\_\_\_\_\_, Defendant

The undersigned party(ies) request(s) the Court to order a Case Management Conference in the above entitled action.

Plaintiff and Defendant have complied with the requirements of Supplemental Rule 410 regarding Mandatory Self Disclosure and Supplemental Rule 401 regarding Financial Statements. [Supplemental Rule 401 only applies if the action seeks a financial order.]

The reason for this request is \_\_\_\_\_

It is requested that at the conference, the Court: (check all appropriate boxes)

- ☐ Identify or formulate the principal issues in contention
- ☐ Explore the possibility of settlement
- ☐ Establish deadlines for filing motions and a time framework for their disposition
- ☐ Prepare a discovery schedule
- ☐ Other \_\_\_\_\_

**THE PARTY(IES) MAKING THIS REQUEST MUST PROVIDE THE FOLLOWING INFORMATION:** (please print)

**Plaintiff**

Name: \_\_\_\_\_  
Attorney or Plaintiff if *pro se*

\_\_\_\_\_  
(PRINT name)

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

B.B.O # \_\_\_\_\_

Date of filing this request \_\_\_\_\_

SIGNATURE(S) OF PERSON(S) FILING THIS REQUEST

\_\_\_\_\_  
(PRINT name)

**Defendant**

Name: \_\_\_\_\_  
Attorney or Defendant if *pro se*

\_\_\_\_\_  
(PRINT name)

Address: \_\_\_\_\_

Tel. No. \_\_\_\_\_

B.B.O # \_\_\_\_\_

\_\_\_\_\_  
(PRINT name)

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**Certificate of Service**

I hereby certify that I have served a copy of this request upon: \_\_\_\_\_

\_\_\_\_\_  
(name and address of party or name and address of attorney of record; including, street address, city/town, zip code)

By ☐ delivery in hand \_\_\_\_\_ ☐ mailing (postage paid on) \_\_\_\_\_  
(date of delivery) (date of mailing)

Signature \_\_\_\_\_

It is **ORDERED** that the within request:

☐ be presented before a justice of this court upon notice to the opposing party.

☐ is hereby **DENIED**.

☐ is hereby **ALLOWED**. It is further **ORDERED** that the parties and their attorney(s), if applicable, shall appear before a justice of the Probate and Family Court on \_\_\_\_\_ at \_\_\_\_\_ ☐ AM ☐ PM  
(date) (time)  
for a Case Management Conference.

It is further **ORDERED** that counsel for the parties confer prior to the Case Management Conference for the purpose of preparing a joint statement. This statement shall be filed with the Court no later than five (5) business days prior to the Case Management Conference, and shall include the following information:

1. An agenda of matters that one or both parties seek to have addressed at the conference.
2. A proposed schedule of discovery deadlines, dates for presenting motions up to the time of trial, and for the scheduling of a pretrial conference. If no agreement is reached on said schedule, each party shall submit a proposed schedule.
3. Certifications signed by counsel and/or the parties affirming that each party and their counsel if represented, have conferred with a view to outlining the costs of conducting the full course-and any alternative course-of the litigation.

4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_  
JUSTICE OF PROBATE AND FAMILY COURT