

UNITED STATES DISTRICT COURT
SOUTHERN DISTRICT OF NEW YORK

_____,

Plaintiff(s),

against

_____,

Defendant(s).

___ Civ. No. ___

**CASE REPORT AND
[PROPOSED] CASE
MANAGEMENT PLAN FOR
PRO SE CASE**

1. Summary of Claims, Defenses, and Relevant Issues:

Plaintiff/Defendant (circle one)

2. I understand my obligation to preserve information relevant to this action and I am preserving that information now.

Plaintiff/Defendant (circle one)

3. Proposed Schedule:

All discovery must be completed by _____.

a. Initial Requests for Documents must be made by _____.

b. Depositions shall be completed by _____.

i. Neither party may take more than _____ depositions. Absent an agreement between the parties or an order from the Court, non-party depositions shall follow initial party depositions.

c. Documents from Third Parties (such as doctors) will/will not (circle one) be required. If required, the following are the Third Parties from whom the parties will request documents:

i. Subpoenas requesting documents from Third Parties must be served by _____. Any party that receives a production from a Third Party must provide a copy of that production to all other parties in this action.

d. There will/will not (circle one) be expert testimony in this case. If expert testimony will be needed, please describe the topic on which each expert is expected to testify.

- i. Written reports by any expert(s) must be served on the other parties in this action by _____.
Depositions of experts must be completed by _____.

4. Early Settlement or Resolution:

The parties have/have not (circle one) discussed the possibility of settlement. The parties request a settlement conference by no later than _____. The following information is needed before settlement can be discussed:

5. Other Matters:

Plaintiff/Defendant (circle one) wishes to discuss the following additional topics at the Initial Case Management Conference.

Respectfully submitted this _____ day of _____.

Name

Counsel for _____
(if applicable)

Address

Email

Phone Number