

Confidential Case Summary

- Describe the dispute or lawsuit.
- Please provide the name and title of all persons who will be appearing to mediate with full settlement authority on behalf of each corporate (non-natural) party.
- Is the dispute based / supported by one or more writings / contracts, emails, texts (attach) or oral communications? If so, please provide copies.
- Identify any applicable statutes. (for liability and/or damages)
- From your standpoint as plaintiff or defendant - What are the damages resulting from this dispute?

- Identify all important non-party stakeholders describing their role in the dispute.
- Are there any ongoing relationships (personal / business) between parties and other stakeholders that weigh upon the resolution of this dispute?
- Describe any significant personal conflicts that have/may impede settlement communications and negotiations.

- Were there any prior attempts to avoid or resolve this matter? Attach any prior written offers, counter offers of settlement? If so, please provide copies.
- Were there any prior attempts to mediate?
- Is this mediation court ordered? (attach court order)
- Please describe any pre-dispositions for or against mediation
- Please formulate terms you might offer or be willing to accept to settle the case.

- What are the primary points of disagreement? (e.g., applicable law / remedies, facts.)
- What are at least three things you would like to know from the opposing parties which may impact your view of the dispute?
- What are at least three things about your case that the opposing parties do not know that could impact their view of the dispute?
- Please describe (attach) all unanswered / unproduced discovery requests.

- Copies of Key Pleading: Complaint, Answer, Affirmative Defenses, Counterclaims
- Copies of Relevant Discovery: Interrogatories, Admissions, Deposition Transcripts
- Prior Court Orders / Pending Motions for Summary Judgment
- Upcoming Hearings?
- Trial Date?