

IN THE UNITED STATES DISTRICT COURT
FOR THE SOUTHERN DISTRICT OF OHIO
WESTERN DIVISION

SUN LIFE ASSURANCE COMPANY OF CANADA,	:	
	:	
Plaintiff,	:	
	:	
vs.	:	Case No. 3:14cv041
	:	
RICHARD E. JACKSON, <i>et al.</i> ,	:	JUDGE WALTER H. RICE
	:	
Defendants.	:	

ENTRY JOURNALIZING RESULTS OF PRELIMINARY PRETRIAL
CONFERENCE OF MAY 21, 2014, WITH UPDATED INFORMATION

The captioned cause came on to be heard upon a preliminary pretrial conference call on May 21, 2014. The following matters were discussed and agreed upon, insofar as further procedures are concerned:

1. The initial issue to be confronted is whether this matter will be decided on the administrative record only or, in the alternative, whether certain discovery is to be permitted and added to the administrative record, prior to cross motions for judgment on the administrative record being filed.
2. Within thirty days of the May 21, 2014, conference call, Plaintiff's counsel was to file the administrative record. This was done on June 20, 2014.
3. The Court gave the Defendants thirty days after the filing of the administrative record to advise Plaintiff's counsel as to any further discovery they deem necessary. If an agreement could not be reached, the Court was to be so advised and promised to resolve the issue.

4. Said informal requests were filed by the Defendant Richard Jackson, acting *pro se*, on July 16, 2014 (Doc. #20) and by the Defendant Sierra Jackson on July 17, 2014 (Doc. #22).

5. Plaintiff's counsel is to advise this Court, not later than the close of business on Friday, August 15, 2014, whether said informal discovery will be provided the Defendants. If so, the Court will convene a telephone conference call to set a date for the filing of cross motions for judgments on the pleadings. If not, the Court will convene a telephone conference call at which point the parties will argue as to why they are (or are not) entitled to discovery beyond the four corners of the administrative record. The court will then make a ruling on that issue, perhaps with the help of memoranda, following which a date for the filing of potentially dispositive motions and, if necessary, an evidentiary hearing will be scheduled.



WALTER H. RICE
UNITED STATES DISTRICT JUDGE

July 29, 2014

Copies to:

Counsel of record
Richard Jackson, *Pro Se*