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**Feb 04 2025**

**SC Court of Appeals**

IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF KANSAS

JOSEPH THERIAULT and WILLIAM WEIGEL,  
individually and on behalf of all those similarly  
situated,

Plaintiffs,

v.

Case No. 23-2477-JWB

NEW DIRECTION IRA, INC., NEW DIRECTION  
TRUST COMPANY, and MAINSTAR TRUST,

Defendants.

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CHRISTY WALLACE  
on behalf of herself and all others similarly situated,

Plaintiff,

v.

Case No. 24-2007-JWB

NEW DIRECTION IRA, INC., NEW DIRECTION  
TRUST COMPANY, and MAINSTAR TRUST,

Defendants.

**SCHEDULING ORDER FOR SUMMARY TRIAL**

The court held a telephone scheduling conference at 10am on November 25, 2024, with all parties appearing by phone, at which the parties and the court discussed a proposed scheduling order for a summary trial to determine the issue of arbitrability in this case. Based on that conference, the court enters the following deadlines in both the captioned cases:

November 25, 2024: Opening of Written Discovery Period (14-day response period for written discovery).

**December 6, 2024:** **Status Conference with the Court at 10:00 a.m. by phone on discovery issues (if necessary). Parties should dial 316-402-0044 Conference ID 125 186 250.**

December 6, 2024: The parties shall exchange an initial list of witnesses and exhibits proposed to be used at the summary trial, similar to a Rule 26(a)(1) initial disclosure. Any proposed exhibits not previously provided shall be produced concurrently with the exchange of lists.

December 13, 2024: Deposition notices for witnesses and 30(b)(6) Deponents to be sent for all parties.

December 20, 2024: Disclosure of 30(b)(6) deponents and any objections to the 30(b)(6) notice – including identification of all other knowledgeable persons. Opening of witness and 30(b)(6) deposition period.

January 21, 2025: Close of deposition period. Close of written discovery.

February 3, 2025: All parties to submit final witness and exhibit lists.

February 13, 2025: Each party shall file and serve a pretrial brief containing the following: (a) a summary of the party’s position on the question of arbitrability; (b) any objections to the adverse party’s witnesses/exhibits disclosure; and (c) Defendants shall include a timeline of contract revisions as an exhibit or attachment as instructed during the November 25, 2024, status conference.

February 20, 2025: Each party shall file and serve a response to any objections contained in the adverse party’s pretrial brief, and Plaintiffs shall respond to Defendants’ timeline of contract revisions.

February 25, 2025: The parties shall file and serve a reply, if needed.

**February 28, 2025:** **Pretrial conference before Judge Broomes at 10:00 a.m. to address any outstanding issues that have arisen in the parties’ respective pretrial briefs. Parties should dial 316-402-0044 Conference ID 125 186 250.**

**March 4-5, 2025:** **Summary Trial held at 9:00 a.m. U.S. District Court, 401 N. Market St., Wichita, KS 67202 in courtroom 238.**

IT IS SO ORDERED. Dated this 26th day of November, 2024.

s/ John W. Broomes \_\_\_\_\_  
JOHN W. BROOMES  
UNITED STATES DISTRICT JUDGE