FORM 2B - PRE-HEARING CONFERENCE REPORT  
OF THE PRESIDING OFFICER

Discipline Committee of the  
Ontario Professional Planners Institute

**IN THE MATTER OF** **THE *ONTARIO PROFESSIONAL PLANNERS INSTITUTE ACT***, **1994**, as amended and the regulations thereunder, as amended;

**AND IN THE MATTER OF** allegations of breaches of the Professional Code of Practice referred by the Discipline Committee of the Ontario Professional Planners Institute regarding (*Member’s name*)

PRE-HEARING CONFERENCE  
REPORT OF THE PRESIDING OFFICER

A pre-hearing conference was held in this matter on (*date*):

In attendance were: (*list each attendee and his or her capacity*)

* + ,
  + ,
  + ,
  + ,
  + ,
  + ,

Agreements

The parties agreed to the following:

1. On the subject of whether the issues can be simplified:

1. On the subject of whether there are any agreed upon facts:

1. On the subject of the addition of parties:

1. On the subject of settlement:

1. On the subject of the advisability of attempting other forms of resolution:

1. On the subject of disclosure:

1. On the subject of motions:

1. On the subject of a documents brief:

1. On the subject of written arguments and books of authorities:

1. On the subject of witnesses and/or expert witnesses:

1. On the subject of scheduling the hearing:

1. Other:

Undertakings

The       (*College/Counsel for the College or member/Counsel for the Member*) provided the following undertaking(s) at the pre-hearing conference:

Directions or Orders

The Presiding Officer gave the following direction(s) and/or made the following order(s) at the pre- hearing conference:

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|  |  |  |
| Date |  | Signature of Presiding Officer |
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