

LAW OFFICES  
**LEON W. BERG, P.A.**

THE PENTHOUSE, SUITE 500  
28 ALLEGHENY AVENUE TOWSON, MD 21204-3911  
(410) 494-7770 FAX: (410) 494-7771  
(e-mail) [legalleon@aol.com](mailto:legalleon@aol.com)

\_\_\_\_\_, 2017

**VIA EMAIL ONLY:**  
**attorney@gmail.com**

John Smith Esq.  
123 Elm St.  
Towson, MD 21204

**counselor@attorney.com**

Mary Williams, Esq.  
456 Juniper St.  
Towson, MD 21204

Re: *Jones v. Jones*  
*Case No.: 03-C-00-00000*

Dear Counsel:

Pursuant to my order of appointment, dated \_\_\_\_\_, I have reviewed the Court file in the above entitled matter. Consistent with the terms of the order of appointment, I am requesting that each of you provide me, within \_\_\_ days from the date of this letter, the following information/material, if available to you or your client:

1. The names, addresses and telephone numbers and email address of no more than three individuals that you would want me to contact, who you consider to be *critical* to my assessment of what is in the children's best interests. Please advise as to what information you believe these persons can provide.
2. Mr. Smith is required, by the terms of the order of appointment, to provide me with copies of the pleadings within ten (10) days. After reviewing the file, I am asking for copies of the following pleadings only:

a....  
b....  
c....

3. Each party is to provide me, within \_\_\_\_ days of the date of the order, copies of the following reports pertaining to any of the children, which are considered by you to be relevant to either party's position: medical records; school records; reports and /or evaluations pertaining to each child's physical, mental or emotional condition; medical or psych-evaluation records pertaining to either parent; learning assessments of any kind; police reports and reports from the Department of Social Services pertaining to any abuse.
4. Each party is to provide me with any other reports or correspondence, and any other documentary evidence (including copies of any social media pages, texts, emails, etc.) of any nature or description which you consider to be *significant* to the custody/visitation issues in this case.
5. If either of you are aware of documentary evidence that is not available to you but needs to be accessed, please advise.
6. Each party is to provide me, within \_\_\_\_ days of the date of this letter: The name, address and phone number of all therapists who have seen the children in counseling or therapy or who have otherwise treated or evaluated any of the children at any time; and the name and address of any other person with whom any child has a statutory privilege, if you consider such person to have relevant information-and inform me as to what information you believe that person can provide.
7. Each party is to provide me with the name and address of any physician for any of the children in the event that either of you consider that to be relevant to the dispute, and inform me as to why you consider that information to be relevant.
8. If there are answers to interrogatories, responses to requests for admissions and documents requested and produced, please provide me with copies of same to the extent that such discovery relates to the custody and access issue.
9. Please keep me copied on all pleadings, submissions of discovery, etc. and deposition transcripts. Please clear dates with me for any deposition and include notice.

Letter to Counsel

\_\_\_\_\_, 2017

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If either party will insist upon formal discovery in order to provide me with the information requested, please advise in writing within 5 days of the date of this letter, and I will send out formal interrogatories and document requests. Otherwise, I will take the failure to object timely as an agreement among the parties to provide the discovery based on these written requests.

I would like to arrange separate meetings with the plaintiff and the defendant, Please call my office to arrange a meeting. This meeting is intended to allow each party to provide me with what he/she considers to be relevant information, and to offer his/her point of view regarding the current dispute in order to help me explore resolutions to the current dispute, without prejudice. You must be present with your client unless your presence is waived in writing. Please remind your client that there is no privilege of confidentiality in effect when communicating with me.

I am also willing to receive a written statement from each of you with your respective settlement positions and the reason(s) you believe that your proposed resolution is in the children's best interest. This information will be treated as settlement discussion, and shall be without prejudice and will not be divulged to the other party if confidentiality is requested.

Please advise, in writing, if I am authorized to speak to your client outside the presence of counsel. It is often the case that parties will contact me in the course of litigation. I want to know, in advance, if I may speak to your client or simply have my secretary advise the caller that I am not authorized to do so.

I will want to meet with the children after meeting with the parents, and I will also meet with any therapist who sees any of the children. As parents correctly advise children not to speak to strangers, I will depend on each party to appropriately inform their children as to my role, and to instruct their children that although they do not know me, it is okay to speak with me. Times will be arranged at a later date.

I look forward to working with both sides in an effort to bring this matter to a resolution that is in the children's best interest.

Very truly yours,

LAW OFFICES OF LEON W. BERG, P.A.

  
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LEON W. BERG

LWB/lb