

UNITED STATES BANKRUPTCY COURT
WESTERN DISTRICT OF NORTH CAROLINA
CHARLOTTE DIVISION

In re

ALDRICH PUMP LLC, *et al.*,¹

Debtors.

Chapter 11

Case No. 20-30608 (LMJ)

(Jointly Administered)

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS

Plaintiff,

v.

ALDRICH PUMP LLC, MURRAY BOILER
LLC, TRANE TECHNOLOGIES COMPANY
LLC, and TRANE U.S. INC.,

Defendants.

Adv. Pro. No. 21-03029

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS, on behalf
of the estates of Aldrich Pump LLC and Murray
Boiler LLC,

Plaintiff,

v.

INGERSOLL-RAND GLOBAL HOLDING
COMPANY LIMITED, TRANE
TECHNOLOGIES HOLDCO INC., TRANE
TECHNOLOGIES COMPANY LLC, TRANE
INC., TUI HOLDINGS INC., TRANE U.S. INC.,
and MURRAY BOILER HOLDINGS LLC,

Defendants.

Adv. Pro. No. 22-03028

¹ The Debtors are the following entities (the last four digits of their respective taxpayer identification numbers follow in parentheses): Aldrich Pump LLC (2290) and Murray Boiler LLC (0679) (hereinafter the “Debtors”). The Debtors’ address is 800-E Beaty Street, Davidson, North Carolina 28036.



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OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS on behalf of
the estates of Aldrich Pump LLC and Murray
Boiler LLC,

Plaintiff,

Adv. Pro. No. 22-03029

v.

TRANE TECHNOLOGIES PLC, INGERSOLL-
RAND GLOBAL HOLDING COMPANY
LIMITED, TRANE TECHNOLOGIES
HOLDCO INC., TRANE TECHNOLOGIES
COMPANY LLC, TRANE INC., TUI
HOLDINGS INC., TRANE U.S. INC.,
MURRAY BOILER HOLDINGS LLC, SARA
BROWN, RICHARD DAUDELIN, MARC
DUFOUR, HEATHER HOWLETT,
CHRISTOPHER KUEHN, MICHAEL
LAMACH, RAY PITTARD, DAVID
REGNERY, AMY ROEDER, ALLAN
TANANBAUM, EVAN TURTZ, MANLIO
VALDES, and ROBERT ZAFARI

Defendants.

PLAINTIFF’S MOTION TO AMEND CASE MANAGEMENT ORDER

The Official Committee of Asbestos Personal Injury Claimants (the “Committee” or “Plaintiff”) respectfully moves (the “Motion”) to amend the governing Case Management Order [Adv. Pro. No. 21-03029, Dkt. No. 117; Adv. Pro. 22-03028, Dkt. No. 39; Adv. Pro. 22-03029, Dkt. No. 55] (“Adversary CMO”) entered in each of the above-captioned adversary proceedings²,

² Adv. Pro. No. 21-03029 (LMJ) (the “SubCon Proceeding”); Adv. Pro. No. 22-03028 (LMJ) (the “Fraudulent Transfer Proceeding,”); and Adv. Pro. No. 22-03029 (LMJ) (the “Fiduciary Duty Proceeding” and, together with the SubCon Proceeding and the Fraudulent Transfer Proceeding, the “Adversary Proceedings”).

substantially in the form attached hereto as **Exhibit A** (the “Proposed Amended CMO”).³ In support of the Motion, Plaintiff respectfully represents as follows:

PRELIMINARY STATEMENT

1. The Proposed Amended CMO is essential to advancing the case efficiently and consistent with the Court’s stated interest in moving these proceedings forward on a clearly defined track.⁴ It is intended to ensure timely resolution of remaining discovery disputes in the Adversary Proceedings, establish procedure through and including expert discovery, and ultimately has a goal of trial in the fall of 2026. Plaintiff and Defendants negotiated many of the terms of the Proposed Amended CMO and remain at an impasse as to certain provisions. Namely, there appears to be a fundamental disagreement regarding the procedural posture of the Adversary Proceedings. Defendants contend that these proceedings should be stayed until the estimation issues in the main bankruptcy case (No. 20-30608) are fully resolved. However, the Court (via Judge Whitley) already ruled on this issue, and thus it is law of the case that the Fraudulent Transfer and SubCon Adversary Proceedings shall proceed. Putting aside that this issue was already resolved by Judge Whitley, there is no basis to further delay discovery or progression of the Fraudulent Transfer and SubCon Adversary Proceedings.

2. Plaintiff understands and shares the Court’s desire to move this case forward and is committed to doing everything possible to facilitate that progress. To that end, Plaintiff submits the Proposed Amended CMO to serve as a framework for resolution or, at minimum, provide a basis for further discussion at the upcoming hearing.

³ Attached hereto as **Exhibit B**, for ease of reference, is a redline comparison of Plaintiff’s Proposed Amended Case Management Order to the controlling Case Management Order [Dkt. No. 117].

⁴ See Mar. 27, 2025 Hr’g Tr. 7:15–16 (noting the Court’s desire for deadlines to be imposed and matters to proceed).

BACKGROUND

3. On June 18, 2020 (the “Petition Date”), the Debtors filed voluntary petitions for relief under chapter 11 of title 11 of the United States Code (the “Bankruptcy Code”) in the United States Bankruptcy Court for the Western District of North Carolina. *See In re Aldrich Pump LLC*, No. 3:20-bk-30608 (LMJ) (Bankr. W.D.N.C.); *In re Murray Boiler LLC*, No. 20-30609 (LMJ) (Bankr. W.D.N.C.).⁵

4. On June 30, 2020, the Bankruptcy Administrator filed a motion to appoint an official committee of asbestos personal injury claimants (Dkt. No. 126), which the Court granted as modified in an order dated July 7, 2020 (Dkt. No. 147).

5. On October 18, 2021, the Committee filed a *Motion for Entry of an Order Granting Leave, Standing, and Authority to Investigate, Commence, Prosecute, and to Settle Certain Causes of Action* (Dkt. No. 848), seeking among other things, standing and authority to investigate, commence, and prosecute actions on behalf of the Debtors’ estates, with respect to, arising from or otherwise related to the Corporate Restructuring (as defined in the motion granted) including, without limitation, the subsequent filing in the Bankruptcy Case (the “Standing Motion”).

6. On October 18, 2021, Plaintiff commenced the SubCon Proceeding by filing a Complaint and related *Motion for Substantive Consolidation of Debtors’ Estates with Certain Nondebtor Affiliates or, Alternatively, to Reallocate Debtors’ Asbestos Liabilities to Those Affiliates*. Adv. Pro. No. 3:21-ap-03029, Dkt. Nos. 1 & 2.

⁵ References herein to “Dkt. No.,” unless otherwise stated, shall refer to filings in the case *In re Aldrich Pump LLC*, No. 3:20-bk-30608 (LMJ) (Bankr. W.D.N.C.).

7. On December 20, 2021, Defendants⁶ in the SubCon Proceeding moved to dismiss that adversary proceeding. Adv. Pro. No. 21-03029, Dkt. Nos. 17 & 18. On April 14, 2022, the Court entered its *Order Denying in Part and Granting in Part the Motions of the Debtors and Non-Debtor Affiliates to Dismiss the Adversary Complaint*. Adv. Pro. No. 3:21-ap-03029, Dkt. No. 71.

8. During the January 27, 2022 hearing, the Court granted Plaintiff's Standing Motion (see Jan. 27, 2022 Hr'g Tr. at 22:6-7), which was later memorialized in a written order, dated April 14, 2022. Dkt. No. 1121. In conjunction with granting Plaintiff's Standing Motion, the Court remarked that it was not inclined to allow estimation to proceed without the Adversary Proceedings going forward as well.⁷

9. On March 14, 2022, the Debtors and Defendants filed a *Motion of the Debtors and Non-Debtor Affiliates for an Order (A) Authorizing the Debtors to Enter into Tolling Agreement and (B) Staying Litigation*. Dkt. No. 1044. Judge Whitley entered an *Order Denying Motion of the Debtors and Non-Debtor Affiliates for an Order (A) Authorizing the Debtors to Enter into Tolling Agreement and (B) Staying Litigation* on April 14, 2022. Dkt. No. 1119.

10. On June 18, 2022, Plaintiff commenced the Fraudulent Transfer Proceeding by filing a complaint asserting claims for actual and constructive fraudulent transfer, among other things, against the above-captioned Defendants.⁸ Adv. Pro. No. 3:22-ap-03028, Dkt. No. 1.

⁶ The defendants in the SubCon Proceeding are Aldrich Pump LLC, Trane Technologies Company LLC, Murray Boiler LLC, and Trane U.S. Inc.

⁷ See Jan. 27, 2022 Hr'g Tr. at 21:22-22:5; see also *id.* at 18:19-24 ("The debtor says the standing motion's unnecessary. . . . Again, this is one of those "let's do the things I'd like to do in the case and not do the things that the opponent wants to do." The debtor would like to estimate, but I think this is -- both are litigation and if we're going to do this, we ought to do both.").

⁸ The defendants in the Fraudulent Transfer Proceeding are Ingersoll-Rand Global Holding Company Limited, Trane Technologies HoldCo Inc., Trane Technologies Company LLC, Trane Inc., TUI Holdings Inc., Trane U.S. Inc., and Murray Boiler Holdings LLC.

11. Also on June 18, 2022, Plaintiff commenced the Fiduciary Duty Proceeding by filing a complaint asserting causes of action including, without limitation, breach of fiduciary duty, aiding and abetting a breach of fiduciary duty, and civil conspiracy against the above-captioned Defendants.⁹ Adv. Pro. No. 3:22-ap-03029, Dkt. No. 1.

12. On September 9, 2022, Defendants to the Fraudulent Transfer Proceeding filed an answer and affirmative defenses in response to the complaint filed therein. Adv. Pro. No. 3:22-ap-03028, Dkt. No. 11.

13. On January 10, 2023, the Court entered the Adversary CMO. The Adversary CMO provides that the discovery completed in the Preliminary Injunction Proceeding will be deemed to have been conducted in the Adversary Proceedings.¹⁰ The Adversary CMO further provides that discovery conducted after the date of the Order as part of the Fraudulent Transfer Proceeding or the SubCon Proceeding is deemed to have occurred in all Adversary Proceedings, including the Fiduciary Duty Proceeding.¹¹ The Adversary CMO does not include any deadlines for the completion of discovery, further motion practice, or trial.

14. This Court entered an *Order Establishing Joint Discovery Plan and Report (ESI Protocol)* (“Discovery Plan Order”) in both the SubCon and Fraudulent Transfer Proceedings on April 24, 2023.¹² The Discovery Plan Order sets forth limitations on discovery, parameters for document production, and an electronically stored information protocol. The Discovery Plan

⁹ The defendants in the Fiduciary Duty Proceeding are Trane Technologies plc, Ingersoll-Rand Global Holding Company Limited, Trane Technologies HoldCo Inc., Trane Technologies Company LLC, Trane Inc., TUI Holdings Inc., Trane U.S. Inc., Murray Boiler Holdings LLC, Sara Brown, Richard Daudelin, Marc Dufour, Heather Howlett, Christopher Kuehn, Michael Lamach, Ray Pittard, David Regnery, Amy Roeder, Allan Tananbaum, Evan Turtz, Manilo Valdes, and Robert Zafari.

¹⁰ Adversary CMO ¶ C.2.

¹¹ Adversary CMO ¶ C.1.i.

¹² Adv. Pro. No. 21-03029, ECF No. 142; Adv. Pro. No. 22-03028, ECF No. 69.

Order also does not include any deadlines for the completion of discovery, further motion practice, or trial.

15. Significant discovery requests and responses, and meet-and-confer efforts, have been undertaken in the Adversary Proceedings. Written discovery has been propounded and responded to, and the parties have held multiple calls and engaged in extensive communications to address and negotiate various discovery disputes. While the parties continue to work through certain discovery issues, there remain threshold disputes that require this Court's intervention before discovery can meaningfully proceed. Those matters will be filed before this Court in short order.

16. On March 27, 2025, this Court stated on the record that it viewed discovery deadlines as necessary and appropriate. Mar. 27, 2025 Hr'g Tr. 7:15–16.

17. After a number of meet and confers and exchanges on various discovery issues, on August 7, 2025, Plaintiff sent an initial draft of the Proposed Amended CMO to Defendants and the parties have since been negotiating the terms of the Proposed Amended CMO.¹³

18. While Plaintiff and Defendants were able to resolve certain ancillary issues related to the Proposed Amended CMO, they are at an impasse as to certain provisions.¹⁴ To facilitate resolution, Plaintiff submits the appended Proposed Amended CMO for the Court's consideration. Plaintiff remains hopeful that the parties can reach agreement prior to the hearing or, at a minimum, narrow the remaining issues for discussion with the Court.

¹³ The prior version of the Proposed Amended CMO that Plaintiff exchanged with Defendants contained shorter deadlines. However, after considering Defendants' feedback and in an effort to reach consensus, Plaintiff has extended the deadlines.

¹⁴ At the request of Defendants, Plaintiff agreed to delay the filing of this Motion by one month in an effort to reach a resolution. Plaintiff now brings this Motion after the month has passed and the impasse as to certain provisions remains.

JURISDICTION & VENUE

19. This Court has jurisdiction to consider this matter pursuant to 28 U.S.C. §§ 157 and 1334. Plaintiff asserts that this is a core proceeding pursuant to 28 U.S.C. § 157(b), and Defendants dispute same.

20. The Adversary CMO also provides that this Court “retain[s] exclusive jurisdiction over any and all matters arising from or related to the implementation, interpretation or enforcement of [the Adversary] Order.” Adversary CMO ¶ D.2.

21. Venue for this matter is proper in this district pursuant to 28 U.S.C. §§ 1408 and 1409.

RELIEF REQUESTED

22. Plaintiff seeks entry of its Proposed Amended CMO, substantially in the form attached hereto as **Exhibit A**, pursuant to section 105(a) of the Bankruptcy Code, and Bankruptcy Rule 7026, to establish a fair schedule that advances the Adversary Proceedings toward resolution in a reasonable time frame.

BASIS FOR RELIEF

23. Section 105(a) of the Bankruptcy Code provides that bankruptcy courts “may issue any order, process, or judgment that is necessary or appropriate to carry out the provisions of [the Bankruptcy Code].” 11 U.S.C. § 105(a). Thus, bankruptcy courts have broad authority and discretion to enforce the provisions of the Bankruptcy Code.

24. Courts here (including in this case) and elsewhere regularly approve case management procedures to promote the efficient administration of cases. *See, e.g., In re DBMP LLC*, Adv. Pro. No. 3:21-ap-03023, Dkt. No. 94, Adv. Pro. No. 3:22-ap-03000, Dkt. No. 48, Adv. Pro. No. 3:22-ap-03001, Dkt. No. 37 (Bankr. W.D.N.C. May 23, 2022) (approving case

management procedures in three adversary proceedings); *In re Kaiser Gypsum Co., Inc.*, No. 16-BK-31602, Dkt. No. 277 (Bankr. W.D.N.C. Dec. 30, 2016) (approving case management and scheduling procedures).

25. Here, the Proposed Amended CMO would establish a fair, realistic, orderly, and reasonable schedule for the remainder of the Adversary Proceedings. The Proposed Amended CMO establishes: (i) discovery deadlines, including deadlines for final discovery production, fact discovery, expert discovery, and exchange of opening and rebuttal expert reports; (ii) a dispositive motions deadline; (iii) a pre-trial conference date; and (iv) a trial date. Thus, the Proposed Amended CMO provides the Court and the parties with certainty and advances these cases toward resolution without undue delay. The certainty afforded by the Proposed Amended CMO will substantially reduce any delays that may arise and promote conservation of the Court's and the parties' resources.

26. The Proposed Amended CMO is also consistent with both Judge Whitley's directives and the way the parties have been operating over the past several years. In particular, to the extent Defendants argue that the estimation matter should precede the Adversary Proceedings, that issue has already been litigated and rejected.

27. Early in the case, the Court entered the Standing Order, granting Plaintiff standing to commence, *inter alia*, the Fraudulent Transfer Proceeding and the Fiduciary Duty Proceeding, and made clear that those proceedings should move forward on a parallel track with the estimation matter. Specifically, Judge Whitley rejected Defendants' suggestion that the Adversary Proceedings be stayed pending estimation, stating:

As to the [] suggestion that we file the action [referring to the Adversary Proceedings] and then stay it while we pursue estimation, well, . . . I'm not inclined to allow one without allowing the other. **So I'd say no to that. If**

we’re going to litigate, we’ll litigate the matters that the parties bring before us and not just one side’s preferred dispute.

Jan. 27, 2022, Hr’g Tr. at 21:22-22:5 (emphasis added). Judge Whitley observed that allowing only one proceeding to advance was unlikely to lead to a resolution or otherwise dispose of the bankruptcy case.¹⁵

28. Then, when Defendants disregarded Judge Whitley’s comments and moved to stay the Adversary Proceedings, Judge Whitley denied that motion and reiterated his ruling that it is “not appropriate to enjoin one side and let the other side go forward with their preferred avenue of litigation.” Apr. 1, 2022, Hr’g Tr. at 7:15-16. As Judge Whitley (again) explained: “With all respect for what the, the debtors and affiliates are arguing, I still don’t think estimation is any more likely to produce an accord than proceeding with the 548 litigation, et al., or doing both.” *Id.* at 7:16-20.

29. Unsurprisingly, Judge Whitley’s approach also aligns with how the *DBMP* case was handled. *Id.* at 7:10-12 (“As you know, we got into something similar to this in *DBMP* back in the fall and this, basically, comes out about the same way.”). *See also, e.g., In re DBMP LLC*, Case No. 20-30080, Oct. 14, 2021, Hr’g Tr. at 84:24- 25 (“I view us as having two paths.”); *id.* at 87:3-7 (“I’m not inclined to do a two-step. I think that’s a recipe for delay and additional costs and then, conceptually, it also, effectively adopts one side’s way of, of valuing asbestos claims . . . and then doesn’t allow the, the other party to advance its claim.”).

¹⁵ *See also id.* at 11:20-12:4 (“[A]t the end of the day, I think what, what we end up with is that each side has a preferred course to move this case along and they’re different things. The ACC wants to litigate those, the corporate restructuring. The debtor wants to estimate. I understand both. I’m not sure in the short run that either one of them is going to lead to a lot of negotiation or resolution but it is likely that they could have some effect in the long run and if we’re going to litigate at all on these matters, I’m not going to tell one party that we can do one side’s preferred course, but not the other. Both are, effectively, litigation.”).

30. Defendants’ position—that the Adversary Proceedings should be stayed—not only contradicts the procedural framework that has governed these proceedings for years, but also effectively seeks reconsideration of the Court’s prior rulings—rulings that have already established the parallel-track approach as law of the case.¹⁶ There is no basis to depart from that approach now.¹⁷ Defendants’ attempt to delay the Adversary Proceedings pending resolution of the estimation matter would improperly hinder Plaintiff’s ability to litigate its claims and needlessly prolong these proceedings. Even if estimation were to proceed and be resolved, it would not address or dispose of the core issues raised in the Adversary Proceedings.

31. Accordingly, consistent with the Court’s longstanding directives and the parties’ established course of conduct, Plaintiff requests that the Court enter the Proposed Amended CMO and permit both the estimation matter and the Adversary Proceedings to continue in parallel.

CONCLUSION

WHEREFORE, for the reasons set forth herein, Plaintiff respectfully requests that this Court (a) enter the Proposed Amended CMO, substantially in the form attached hereto as Exhibit A and (b) grant such other and further relief as is just and proper.

[Signatures on the next page]

¹⁶ *Columbia Gas Transmission, LLC v. RDFS, LLC*, 148 F.4th 163, 169 (4th Cir. 2025) (“As most commonly defined, the doctrine of the law of the case posits that when a court decides upon a rule of law, that decision should continue to govern the same issues in subsequent stages in the same case.” (quoting *Christianson v. Colt Indus. Operating Corp.*, 486 U.S. 800, 815-16 (1988))).

¹⁷ Indeed, the circumstances here do not fall within any of the situations where courts within this Circuit decline to follow the law of the case. *See Conway v. Palczuk*, 741 F. Supp. 3d 346, 350 (E.D.N.C. 2024) (“A court may decline to follow the law of the case where: ‘(1) a subsequent trial produces substantially different evidence, (2) controlling authority has since made a contrary decision of law applicable to the issue, or (3) the prior decision was clearly erroneous and would work manifest injustice.’” (quoting *TFWS, Inc. v. Franchot*, 572 F.3d 186, 191 (4th Cir. 2009))).

Dated: October 2, 2025

Respectfully submitted,

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Exhibit A

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In re

ALDRICH PUMP LLC, *et al.*,¹

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Defendants.

Adv. Pro. No. 22-03028

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REGNERY, AMY ROEDER, ALLAN
TANANBAUM, EVAN TURTZ, MANLIO
VALDES, and ROBERT ZAFARI

Defendants.

[PROPOSED] CASE MANAGEMENT ORDER

This matter coming before the Court on the motion filed by the Plaintiff (the “**Plaintiff’s Motion**”)² and defendants’ letters (the “**Defendants’ Letters**”)³ (collectively, the “**Pleadings**”)⁴ in the above-captioned adversary proceedings (collectively, the “**Adversary Proceedings**”) and the above-captioned base case (the “**Bankruptcy Case**”); the Court having reviewed the Pleadings and the other papers filed related thereto and having considered the

² See Adv. Pro. No. 3:21-ap-03029, Dkt. No. 109; Adv. Pro. No. 3:22-ap-03028, Dkt. No. 26; Adv. Pro. No. 3:22-ap-03029, Dkt. No. 22.

³ See Adv. Pro. No. 3:21-ap-03029, Dkt. Nos. 106 & 107; Adv. Pro. No. 3:22-ap-03028, Dkt. Nos. 24 & 25; Adv. Pro. No. 3:22-ap-03029, Dkt. Nos. 20 & 21.

⁴ Capitalized terms used but not otherwise defined herein shall have the meanings given to such terms in the Motion.

statements of counsel related thereto at a hearing before the Court on [_____, 2025] (the “**Hearing**”); the Court finding that (a) the Court has jurisdiction for purposes of entering this Order pursuant to 28 U.S.C. §§ 157 and 1334, (b) venue for purposes of entering this Order is proper in this district pursuant to 28 U.S.C. § 1409, (c) notice of the Pleadings and the Hearing was sufficient under the circumstances, and (d) implementation of the case management procedures described herein in connection with the Adversary Proceedings⁵ is (i) fair and reasonable, (ii) consistent with the Bankruptcy Code, the Federal Rules of Bankruptcy Procedure and the Local Rules, and (iii) appropriate under the circumstances; and the Court having determined that just cause exists for the relief granted herein;

IT IS HEREBY ORDERED THAT:

A. The Plaintiff’s Motion

1. The Plaintiff’s Motion is GRANTED to the extent set forth herein and on the record of the Hearing (which is incorporated herein by reference).
2. Entry of this Case Management Order and agreement to the provisions set forth herein are not intended to be a waiver of any right to timely challenge the jurisdiction of the Bankruptcy Court, including, without limitation, the jurisdiction of the Bankruptcy Court to enter final orders in non-core matters, or the waiver of a right to a jury trial, all of which are expressly reserved. Plaintiff and Defendants further reserve the right to request the District Court withdraw the reference in any matter subject to mandatory or discretionary withdrawal and reserve all other rights, claims, actions, defenses, setoffs or recoupments to which Defendants are or may be entitled under agreements, in law, in equity, or otherwise, all of which rights, claims, actions, defenses, setoffs and recoupments are expressly reserved. To the extent applicable or not previously waived, the deadline to file a motion pursuant to Local Rule 7007-1(b) will be established in a separate case management order negotiated by the parties and/or ordered by the Court.

⁵ Adv. Pro. No. 3:21-ap-03029, Dkt. No. 1, ¶ 11; Adv. Pro. No. 3:22-ap-03028, Dkt. No. 1, ¶ 11; Adv. Pro. No. 3:22-ap-03029, Dkt. No. 1, ¶ 11.

B. Adversary Proceedings Deadlines

1. *Substantive Consolidation Proceeding*

- i. Defendants in the Substantive Consolidation Proceeding answered the Complaint in that proceeding. The filing of such answers in the Substantive Consolidation Proceeding shall not trigger the entry of any pre-trial orders or deadlines until ordered by the Court.
- ii. Discovery in the Substantive Consolidation Proceeding shall proceed according to the Discovery Protocol set forth in Section C below.
- iii. No notice of the Substantive Consolidation Proceeding shall be served on creditors of New TTC and New Trane at this time, and no list of creditors shall be provided by New TTC and New Trane to the Committee, all of which shall be held in abeyance subject to further order of the Court on a motion by one or more of the parties. The timing and content of any such notice, if needed, shall be agreed upon by the parties and/or ordered by the Court after notice and a hearing.
- iv. Defendants are not precluded from filing timely dispositive motions (other than motions to dismiss in lieu of an answer pursuant to Fed. R. Civ. P. 12(b)(6), made applicable by Fed. R. Bankr. P. 7012). A briefing schedule for any such dispositive motion(s) shall be negotiated by the parties and/or ordered by the Court.

2. *Fraudulent Transfer Proceeding*

- i. All defendants to the Fraudulent Transfer Proceeding have executed consents to acceptance of service and, thus, are deemed duly served.
- ii. Defendants to the Fraudulent Transfer Proceeding filed an answer and affirmative defenses on **September 9, 2022**.
- iii. Discovery in the Fraudulent Transfer Proceeding shall proceed according to the Discovery Protocol set forth in Section C below.
- iv. Plaintiffs and Defendants are not precluded from filing timely dispositive motions (other than motions to dismiss in lieu of an answer pursuant to Fed. R. Civ. P. 12(b)(6), made applicable by Fed. R. Bankr. P. 7012). A briefing schedule for any such dispositive motion(s) shall be negotiated by the parties and/or ordered by the Court.

3. *Fiduciary Duty Proceeding*

- i. All defendants to the Fiduciary Duty Proceeding have executed consents to acceptance of service and, thus, are deemed duly served.

- ii. The Fiduciary Duty Proceeding shall be stayed in its entirety, including with respect to all discovery, pending the entry of final orders resolving the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding. “**Final**” means, with respect to any order of court, that such order represents a final and binding determination of all issues within its scope and is not subject to further review on appeal or otherwise. Without limitation, an order becomes “Final” when: (a) no appeal has been filed and the prescribed time for commencing any appeal has expired; or (b) an appeal has been filed and either (i) the appeal has been dismissed and the prescribed time, if any, for commencing any further appeal has expired, or (ii) the order has been affirmed in its entirety and the prescribed time, if any, for commencing any further appeal has expired. For purposes of this Paragraph, an “**appeal**” includes appeals as of right, discretionary appeals, interlocutory appeals, proceedings involving writs of certiorari or mandamus, and any other proceedings seeking review, alteration, amendment or appeal of a court’s order.
- iii. Each defendant to the Fiduciary Duty Proceeding and the Committee covenants and agrees that (a) any of the findings of fact or conclusions of law set forth in any Final order in the Fraudulent Transfer Proceeding or Substantive Consolidation Proceeding shall be binding as to all Parties in the Fiduciary Duty Proceeding, except with respect to any finding of fact as to any individual Fiduciary Duty Defendant with respect to any action or inaction such individual Fiduciary Duty Defendant took or did not take, and that (b) he, she or it shall not challenge such binding finding of fact or conclusion of law on any basis.

C. **Discovery Protocol**

1. *Applicability of Discovery*

- i. All discovery conducted after the date of this Order as part of the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding (collectively, the “**Post-CMO Discovery**”) shall be deemed to have occurred in all Adversary Proceedings, including, without limitation, the Fiduciary Duty Proceeding that has been stayed in its entirety pending the entry of Final orders resolving the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding.
- ii. To avoid duplicative discovery, (a) all parties in the Adversary Proceedings shall have the right to participate in the Post-CMO Discovery; (b) each party that elects to participate in the Post-CMO Discovery consents to the jurisdiction of the Court as a party solely for the purpose of Post-CMO Discovery; and (c) except as set forth herein, each party to the Adversary Proceedings reserves all rights, remedies, defenses and objections with respect to any such Post-CMO Discovery, except with respect to those

rights, remedies, defenses and objections that were waived by such party's non-participation in any such Post-CMO Discovery.

2. *Prior Discovery in Preliminary Injunction Proceeding*

- i. All discovery (production of documents and deposition testimony) conducted in the adversary proceeding captioned *ALDRICH PUMP LLC and MURRAY BOILER LLC v. Those Parties Listed on Appendix A to Complaint*, Adv. Pro. No. 20-03041 (LMJ) and all other discovery that has occurred in the above-captioned Chapter 11 bankruptcy case (collectively, the "**Prior Discovery**") shall be deemed to have been conducted in connection with the Adversary Proceedings.
- ii. The incorporation of the Prior Discovery into the Adversary Proceedings shall not preclude or prejudice any party's (a) ability to seek further Post-CMO Discovery from parties, entities, or individuals who received discovery requests in connection with the Prior Discovery, or (b) right to object to any such Post-CMO Discovery on any ground. For the avoidance of doubt, each party to the Adversary Proceedings that did not participate in the Prior Discovery reserves all rights with respect to any such Prior Discovery. Notwithstanding the foregoing, the parties shall negotiate a discovery protocol and/or seek relief from the Court, as set forth in Paragraph C.3.i below.

3. *Discovery Protocol*

- i. The parties in the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding shall conduct an initial meet-and-confer to create a discovery protocol applicable in the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding, with additional meet and confers as necessary. Should the parties be unable to reach agreement on the terms of a discovery protocol, the parties shall coordinate in providing submissions to the Court and a relevant briefing schedule in advance of filing.
- ii. The following shall be included in any list of not reasonably accessible electronically stored information ("**ESI**") for purposes of search and identification of responsive documents in any discovery protocol for the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding:
 - a. Mobile devices and ESI or other data stored on mobile devices, including smart phones and tablets,⁶ subject to each custodian certifying (the "**Mobile Telephone Certification**") under penalty of perjury either that (A) they did not use a mobile telephone for

⁶ For the avoidance of doubt, the term "mobile devices" does not include laptop computers.

business purposes⁷ during the relevant date range other than making or receiving calls, or (B) if they use a mobile telephone for such business purposes, that all data and information used for such purposes is otherwise stored in the responding party's systems and will be collected from another source or is *de minimis*.⁸ This Mobile Telephone Certification shall be provided to the requesting party within 30 days of service of written discovery or within 30 days after such later date that the custodian is identified and agreed upon or ordered by the Court. In any case, this subparagraph also is subject to the requesting party's reservation of right to seek such data from individual custodians where discovery indicates that data or information on mobile devices may exist responsive to the information requested and the responding party's reservation of right to object to any such request.

- b. Instant/chat messaging (including, e.g., Slack or WhatsApp), subject to each custodian certifying (the "**Instant Message Certification**") under penalty of perjury that they did not, during the relevant date range, use any instant messaging program, application, or platform for business purposes, other than use that was *de minimis*. This Instant Message Certification shall be provided to the requesting party within 30 days of service of written discovery or within 30 days after such later date that the custodian is identified and agreed upon or ordered by the Court. In any case, this subparagraph also is subject to the requesting party's reservation of right to seek such data and information from individual custodians where discovery indicates that data or information in instant messaging programs, applications, or platforms may exist responsive to the information requested and the responding party's reservation of right to object to any such request.

4. *Privilege Logs*

- i. The Debtors, New Trane, New TTC, and the Committee shall meet and confer on potential revisions to the privilege logs submitted with the Prior Discovery (the "**Privilege Logs**") in advance of any motion practice thereon. If no agreement is reached in connection with such meet and confer, a briefing schedule for presenting the issues to the Court for a ruling shall be established. The parties reserve all rights regarding the privilege assertions contained in the Privilege Logs and otherwise.

⁷ For the avoidance of doubt, business purposes include, without limitation, the taking of notes, creation or editing of documents, and communications thereto, in each case for work-related purposes.

⁸ "*De minimis*," as used in this Paragraph C.3.ii.a and in Paragraph C.3.ii.b below, refers to a use that is negligible and, in any event, unrelated to any substantive work on Project Omega or the Debtors' chapter 11 case.

5. *Additional Discovery*

- i. The parties to the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding have conducted a conference pursuant to Fed. R. Civ. P. 26(f) (the “**Rule 26(f) Conference**”).
- ii. All parties in the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding made initial disclosures required by Fed. R. Civ. P. 26(a)(1), and will continue to supplement their disclosures as required by the applicable rules.
- iii. Except as set forth in Section B.3.ii and subject to Section C.2.ii, the parties are not foreclosed from proceeding with Post-CMO Discovery, and all parties’ rights to object to any Post-CMO Discovery on any ground are fully preserved.
- iv. Disputes related to the provision of Post-CMO Discovery, including privilege disputes with respect to Post-CMO Discovery, shall be resolved among the parties or pursuant to further order of the Court.
- v. The Parties will agree on search terms and custodian lists for collection and production of Post-CMO Discovery on or before October 30, 2025. In the event the Parties are unable to agree on search terms and custodian lists by that date, they will file motions with the Court on that date for hearing at the November 20, 2025 Omnibus Hearing so the Court may rule on appropriate custodians and search terms.
- vi. Defendants shall substantially complete production of documents for Post-CMO Discovery on or before three months after the date on which custodians and search terms are determined, either by consent of the parties or court order.
- vii. Any related privilege log must also be produced within 30 days after the substantial completion of document production.
- viii. Any objections to or motions to compel concerning either document production or privilege logs must be filed within 60 days after the completion of privilege logs.
- ix. All fact (non-expert) discovery must be completed no later than May 15, 2026; provided, however, that if any discovery objections and/or motion practice related to the scope of fact discovery remain unresolved as of the date herein, this deadline will be automatically extended until resolution of and compliance with said resolution of the aforementioned fact discovery objections and/or motion practice.
- x. Initial reports from any retained experts under Rule 26(a)(2) are due to be exchanged no later than April 30, 2026.

- xi. Rebuttal reports from retained experts under Rule 26(a)(2) are due to be exchanged no later than June 1, 2026.
- xii. All expert discovery, including any depositions of experts, must be completed no later than June 30, 2026.
- xiii. All potentially dispositive motions must be filed no later than August 14, 2026.

D. Other Case Management Deadlines

- 1. Pre-Trial Deadlines and Pre-Trial Conference
 - i. Any and all motions *in limine*, *Daubert*-type motions, witness and exhibit lists (including any deposition designations), and joint pretrial order must be filed no later than September 30, 2026.
 - ii. A final pre-trial conference will be held in this Court on a date and time provided by the Court, no earlier than September 30, 2026.
- 2. Trial
 - i. Unless the district court withdraws the reference, the trials of the Fraudulent Transfer Adversary Proceeding and the SubCon Adversary Proceeding will be held in this Court, whether or not those trials are conducted separately or combined. Such trials will begin on a date and time provided by the Court, no earlier than October 15, 2026.

E. Miscellaneous

- 1. Notwithstanding anything to the contrary in this Order, the deadlines specified herein may be extended by consent of the parties, except that leave of Court shall be required to alter, adjourn or extend the date of any hearing before the Court. As set forth in Paragraph C.vi. herein, the deadline to complete fact discovery will automatically be extended if any discovery objections and/or motion practice related to the scope of fact discovery remain unresolved as of the date set forth in Paragraph C.vi. to a date upon which resolution of and compliance with said resolution of the aforementioned fact discovery objections and/or motion practice is completed. In addition, upon a showing of good cause by any party and after notice and a hearing, the Court may alter or extend any of the deadlines specified herein. The Court may consider whether the parties have complied with the terms of this Order when considering any request for a change in the deadlines.
- 2. Any party that does not consent to the Bankruptcy Court entering final judgment on all matters raised in the pleadings shall have 30 days from entry of this Order to file a motion to determine whether the Bankruptcy Court may enter a final judgment or order in any cause of action to which the non-consenting party does not consent

to entry of a final judgment or order by the Bankruptcy Court. Such motion shall be accompanied by a memorandum of law in support of the motion.

3. THE FAILURE TO TIMELY MOVE TO DETERMINE WHETHER THE BANKRUPTCY COURT MAY ENTER A FINAL JUDGMENT OR ORDER WITH RESPECT TO ANY MATTER, ISSUE, OR CLAIM FOR RELIEF SHALL CONSTITUTE A WAIVER OF ANY RIGHT TO ADJUDICATION BY A COURT ESTABLISHED UNDER ARTICLE III OF THE UNITED STATES CONSTITUTION AND ANY RIGHT TO A JURY TRIAL, AND THE WAIVER SHALL BE DEEMED TO BE CONSENT TO HAVE THE BANKRUPTCY COURT ENTER FINAL JUDGMENT.
4. This Court shall retain jurisdiction over any and all matters arising from or related to the implementation, interpretation or enforcement of this Order.

Exhibit B

**UNITED STATES BANKRUPTCY COURT
WESTERN DISTRICT OF NORTH CAROLINA
CHARLOTTE DIVISION**

In re

ALDRICH PUMP LLC, *et al.*,¹

Debtors.

Chapter 11

Case No. 20-30608 (~~JCW~~LMJ)

(Jointly Administered)

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS

Plaintiff,

v.

ALDRICH PUMP LLC, MURRAY BOILER
LLC, TRANE TECHNOLOGIES COMPANY
LLC, and TRANE U.S. INC.,

Defendants.

Adv. Pro. No. 21-03029

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS, on behalf
of the estates of Aldrich Pump LLC and Murray
Boiler LLC,

Plaintiff,

v.

INGERSOLL-RAND GLOBAL HOLDING
COMPANY LIMITED, TRANE
TECHNOLOGIES HOLDCO INC., TRANE
TECHNOLOGIES COMPANY LLC, TRANE
INC., TUI HOLDINGS INC., TRANE U.S. INC.,
and MURRAY BOILER HOLDINGS LLC,

Defendants.

Adv. Pro. No. 22-03028

¹ The Debtors are the following entities (the last four digits of their respective taxpayer identification numbers follow in parentheses): Aldrich Pump LLC (2290) and Murray Boiler LLC (0679). The Debtors' address is 800-E Beaty Street, Davidson, North Carolina 28036.

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS on behalf
of
the estates of Aldrich Pump LLC and Murray
Boiler LLC,

Plaintiff,

v.

TRANE TECHNOLOGIES PLC,
INGERSOLL-RAND GLOBAL HOLDING
COMPANY
LIMITED, TRANE TECHNOLOGIES
HOLDCO INC., TRANE TECHNOLOGIES
COMPANY LLC, TRANE INC., TUI
HOLDINGS INC., TRANE U.S. INC.,
MURRAY BOILER HOLDINGS LLC, SARA
BROWN, RICHARD DAUDELIN, MARC
DUFOUR, HEATHER HOWLETT,
CHRISTOPHER KUEHN, MICHAEL
LAMACH, RAY PITTARD, DAVID
REGNERY, AMY ROEDER, ALLAN
TANANBAUM, EVAN TURTZ, MANLIO
VALDES, and ROBERT ZAFARI

Defendants.

Adv. Pro. No. 22-03029

[PROPOSED] CASE MANAGEMENT ORDER

This matter coming before the Court on the motion filed by the Plaintiff (the “**Plaintiff’s Motion**”)² and defendants’ letters (the “**Defendants’ Letters**”)³ (collectively, the “**Pleadings**”)⁴ in the above-captioned adversary proceedings (collectively, the “**Adversary Proceedings**”) and the above-captioned base case (the “**Bankruptcy Case**”); the Court having

² See Adv. Pro. No. 3:21-ap-03029, Dkt. No. 109; Adv. Pro. No. 3:22-ap-03028, Dkt. No. 26; Adv. Pro. No. 3:22-ap-03029, Dkt. No. 22.

³ See Adv. Pro. No. 3:21-ap-03029, Dkt. Nos. 106 & 107; Adv. Pro. No. 3:22-ap-03028, Dkt. Nos. 24 & 25; Adv. Pro. No. 3:22-ap-03029, Dkt. Nos. 20 & 21.

⁴ Capitalized terms used but not otherwise defined herein shall have the meanings given to such terms in the Motion.

reviewed the Pleadings and the other papers filed related thereto and having considered the statements of counsel related thereto at a hearing before the Court on ~~November 30, 2022~~[_____, 2025] (the “**Hearing**”); the Court finding that (a) the Court has jurisdiction for purposes of entering this Order pursuant to 28 U.S.C. §§ 157 and 1334, (b) venue for purposes of entering this Order is proper in this district pursuant to 28 U.S.C. § 1409, (c) notice of the Pleadings and the Hearing was sufficient under the circumstances, and (d) implementation of the case management procedures described herein in connection with the Adversary Proceedings⁵ is (i) fair and reasonable, (ii) consistent with the Bankruptcy Code, the Federal Rules of Bankruptcy Procedure and the Local Rules, and (iii) appropriate under the circumstances; and the Court having determined that just cause exists for the relief granted herein;

IT IS HEREBY ORDERED THAT:

A. The Plaintiff’s Motion

1. The Plaintiff’s Motion is GRANTED to the extent set forth herein and on the record of the Hearing (which is incorporated herein by reference).
2. Entry of this Case Management Order and agreement to the provisions set forth herein are not intended to be a waiver of any right to timely challenge the jurisdiction of the Bankruptcy Court, including, without limitation, the jurisdiction of the Bankruptcy Court to enter final orders in non-core matters, or the waiver of a right to a jury trial, all of which are expressly reserved. Plaintiff and Defendants further reserve the right to request the District Court withdraw the reference in any matter subject to mandatory or discretionary withdrawal and reserve all other rights, claims, actions, defenses, setoffs or recoupments to which Defendants are or may be entitled under agreements, in law, in equity, or otherwise, all of which rights, claims, actions, defenses, setoffs and recoupments are expressly reserved. To the extent applicable or not previously waived, the deadline to file a motion pursuant to Local Rule 7007-1(b) will be established in a separate case management order negotiated by the parties and/or ordered by the Court.

⁵ Adv. Pro. No. 3:21-ap-03029, Dkt. No. 1, ¶ 11; Adv. Pro. No. 3:22-ap-03028, Dkt. No. 1, ¶ 11; Adv. Pro. No. 3:22-ap-03029, Dkt. No. 1, ¶ 11.

B. Adversary Proceedings Deadlines

1. Substantive Consolidation Proceeding

- i. Defendants in the Substantive Consolidation Proceeding answered the Complaint in that proceeding. The filing of such answers in the Substantive Consolidation Proceeding shall not trigger the entry of any pre-trial orders or deadlines until ordered by the Court.
- ii. Discovery in the Substantive Consolidation Proceeding shall proceed according to the Discovery Protocol set forth in Section C below.
- iii. No notice of the Substantive Consolidation Proceeding shall be served on creditors of New TTC and New Trane at this time, and no list of creditors shall be provided by New TTC and New Trane to the Committee, all of which shall be held in abeyance subject to further order of the Court on a motion by one or more of the parties. The timing and content of any such notice, if needed, shall be agreed upon by the parties and/or ordered by the Court after notice and a hearing.
- iv. Defendants are not precluded from filing timely dispositive motions (other than motions to dismiss in lieu of an answer pursuant to Fed. R. Civ. P. 12(b)(6), made applicable by Fed. R. Bankr. P. 7012). A briefing schedule for any such dispositive motion(s) shall be negotiated by the parties and/or ordered by the Court.

2. Fraudulent Transfer Proceeding

- i. All defendants to the Fraudulent Transfer Proceeding have executed consents to acceptance of service and, thus, are deemed duly served.
- ii. Defendants to the Fraudulent Transfer Proceeding filed an answer and affirmative defenses on **September 9, 2022**.
- iii. Discovery in the Fraudulent Transfer Proceeding shall proceed according to the Discovery Protocol set forth in Section C below.
- iv. Plaintiffs and Defendants are not precluded from filing timely dispositive motions (other than motions to dismiss in lieu of an answer pursuant to Fed. R. Civ. P. 12(b)(6), made applicable by Fed. R. Bankr. P. 7012). A briefing schedule for any such dispositive motion(s) shall be negotiated by the parties and/or ordered by the Court.

3. Fiduciary Duty Proceeding

- i. All defendants to the Fiduciary Duty Proceeding have executed consents to acceptance of service and, thus, are deemed duly served.

- ii. The Fiduciary Duty Proceeding shall be stayed in its entirety, including with respect to all discovery, pending the entry of final orders resolving the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding. “**Final**” means, with respect to any order of court, that such order represents a final and binding determination of all issues within its scope and is not subject to further review on appeal or otherwise. Without limitation, an order becomes “Final” when: (a) no appeal has been filed and the prescribed time for commencing any appeal has expired; or (b) an appeal has been filed and either (i) the appeal has been dismissed and the prescribed time, if any, for commencing any further appeal has expired, or (ii) the order has been affirmed in its entirety and the prescribed time, if any, for commencing any further appeal has expired. For purposes of this Paragraph, an “**appeal**” includes appeals as of right, discretionary appeals, interlocutory appeals, proceedings involving writs of certiorari or mandamus, and any other proceedings seeking review, alteration, amendment or appeal of a court’s order.
- iii. Each defendant to the Fiduciary Duty Proceeding and the Committee covenants and agrees that (a) any of the findings of fact or conclusions of law set forth in any Final order in the Fraudulent Transfer Proceeding or Substantive Consolidation Proceeding shall be binding as to all Parties in the Fiduciary Duty Proceeding, except with respect to any finding of fact as to any individual Fiduciary Duty Defendant with respect to any action or inaction such individual Fiduciary Duty Defendant took or did not take, and that (b) he, she or it shall not challenge such binding finding of fact or conclusion of law on any basis.

C. **Discovery Protocol**

1. *Applicability of Discovery*

- i. All discovery conducted after the date of this Order as part of the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding (collectively, the “**Post-CMO Discovery**”) shall be deemed to have occurred in all Adversary Proceedings, including, without limitation, the Fiduciary Duty Proceeding that has been stayed in its entirety pending the entry of Final orders resolving the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding.
- ii. To avoid duplicative discovery, (a) all parties in the Adversary Proceedings shall have the right to participate in the Post-CMO Discovery; (b) each party that elects to participate in the Post-CMO Discovery consents to the jurisdiction of the Court as a party solely for the purpose of Post-CMO Discovery; and (c) except as set forth herein, each party to the Adversary Proceedings reserves all rights, remedies, defenses and objections with respect to any such Post-CMO Discovery, except with

respect to those rights, remedies, defenses and objections that were waived by such party's non-participation in any such Post-CMO Discovery.

2. *Prior Discovery in Preliminary Injunction Proceeding*

- i. All discovery (production of documents and deposition testimony) conducted in the adversary proceeding captioned *ALDRICH PUMP LLC and MURRAY BOILER LLC v. Those Parties Listed on Appendix A to Complaint*, Adv. Pro. No. 20-03041 (~~JEW~~LMJ) and all other discovery that has occurred in the above-captioned Chapter 11 bankruptcy case (collectively, the "**Prior Discovery**") shall be deemed to have been conducted in connection with the Adversary Proceedings.
- ii. The incorporation of the Prior Discovery into the Adversary Proceedings shall not preclude or prejudice any party's (a) ability to seek further Post-CMO Discovery from parties, entities, or individuals who received discovery requests in connection with the Prior Discovery, or (b) right to object to any such Post-CMO Discovery on any ground. For the avoidance of doubt, each party to the Adversary Proceedings that did not participate in the Prior Discovery reserves all rights with respect to any such Prior Discovery. Notwithstanding the foregoing, the parties shall negotiate a discovery protocol and/or seek relief from the Court, as set forth in Paragraph C.3.i below.

3. *Discovery Protocol*

- i. The parties in the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding shall conduct an initial meet-and-confer to create a discovery protocol applicable in the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding, with additional meet and confers as necessary. Should the parties be unable to reach agreement on the terms of a discovery protocol, the parties shall coordinate in providing submissions to the Court and a relevant briefing schedule in advance of filing.
- ii. The following shall be included in any list of not reasonably accessible electronically stored information ("**ESI**") for purposes of search and identification of responsive documents in any discovery protocol for the Fraudulent Transfer Proceeding and Substantive Consolidation Proceeding:
 - a. Mobile devices and ESI or other data stored on mobile devices, including smart phones and tablets,⁶ subject to each custodian certifying (the "**Mobile Telephone Certification**") under penalty of perjury either that (A) they did not use a mobile telephone for

⁶ For the avoidance of doubt, the term "mobile devices" does not include laptop computers.

business purposes⁷ during the relevant date range other than making or receiving calls, or (B) if they use a mobile telephone for such business purposes, that all data and information used for such purposes is otherwise stored in the responding party's systems and will be collected from another source or is *de minimis*.⁸ This Mobile Telephone Certification shall be provided to the requesting party within 30 days of service of written discovery or within 30 days after such later date that the custodian is identified and agreed upon or ordered by the Court. In any case, this subparagraph also is subject to the requesting party's reservation of right to seek such data from individual custodians where discovery indicates that data or information on mobile devices may exist responsive to the information requested and the responding party's reservation of right to object to any such request.

- b. Instant/chat messaging (including, e.g., Slack or WhatsApp), subject to each custodian certifying (the "**Instant Message Certification**") under penalty of perjury that they did not, during the relevant date range, use any instant messaging program, application, or platform for business purposes, other than use that was *de minimis*. This Instant Message Certification shall be provided to the requesting party within 30 days of service of written discovery or within 30 days after such later date that the custodian is identified and agreed upon or ordered by the Court. In any case, this subparagraph also is subject to the requesting party's reservation of right to seek such data and information from individual custodians where discovery indicates that data or information in instant messaging programs, applications, or platforms may exist responsive to the information requested and the responding party's reservation of right to object to any such request.

4. *Privilege Logs*

- i. The Debtors, New Trane, New TTC, and the Committee shall meet and confer on potential revisions to the privilege logs submitted with the Prior Discovery (the "**Privilege Logs**") in advance of any motion practice thereon. If no agreement is reached in connection with such meet and confer, a briefing schedule for presenting the issues to the Court for a

⁷ For the avoidance of doubt, business purposes include, without limitation, the taking of notes, creation or editing of documents, and communications thereto, in each case for work-related purposes.

⁸ "*De minimis*," as used in this Paragraph C.3.ii.a and in Paragraph C.3.ii.b below, refers to a use that is negligible and, in any event, unrelated to any substantive work on Project Omega or the Debtors' chapter 11 case.

ruling shall be established. The parties reserve all rights regarding the privilege assertions contained in the Privilege Logs and otherwise.

5. *Additional Discovery*

- i. The parties to the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding ~~shall conduct~~have conducted a conference pursuant to Fed. R. Civ. P. 26(f) (the “**Rule 26(f) Conference**”)-~~within fifteen (15) business days after entry of this Order.~~
- ii. All parties in the Fraudulent Transfer Proceeding and the Substantive Consolidation Proceeding ~~shall make~~made initial disclosures required by Fed. R. Civ. P. 26(a)(1) ~~within twenty (20) business days after the entry of this Order, and will continue to supplement their disclosures as required by the applicable rules.~~
- iii. Except as set forth in Section B.3.ii and ~~Section C.5.i and~~ subject to Section C.2.ii, the parties are not foreclosed from proceeding with Post-CMO Discovery, and all parties’ rights to object to any Post-CMO Discovery on any ground are fully preserved.
- iv. Disputes related to the provision of Post-CMO Discovery, including privilege disputes with respect to Post-CMO Discovery, shall be resolved among the parties or pursuant to further order of the Court.
- v. The Parties will agree on search terms and custodian lists for collection and production of Post-CMO Discovery on or before October 30, 2025. In the event the Parties are unable to agree on search terms and custodian lists by that date, they will file motions with the Court on that date for hearing at the November 20, 2025 Omnibus Hearing so the Court may rule on appropriate custodians and search terms.
- vi. Defendants shall substantially complete production of documents for Post-CMO Discovery on or before three months after the date on which custodians and search terms are determined, either by consent of the parties or court order.
- vii. Any related privilege log must also be produced within 30 days after the substantial completion of document production.
- viii. Any objections to or motions to compel concerning either document production or privilege logs must be filed within 60 days after the completion of privilege logs.
- ix. All fact (non-expert) discovery must be completed no later than May 15, 2026; provided, however, that if any discovery objections and/or motion practice related to the scope of fact discovery remain unresolved as of the date herein, this deadline will be automatically extended until resolution of

and compliance with said resolution of the aforementioned fact discovery objections and/or motion practice.

- x. Initial reports from any retained experts under Rule 26(a)(2) are due to be exchanged no later than April 30, 2026.
- xi. Rebuttal reports from retained experts under Rule 26(a)(2) are due to be exchanged no later than June 1, 2026.
- xii. All expert discovery, including any depositions of experts, must be completed no later than June 30, 2026.
- xiii. All potentially dispositive motions must be filed no later than August 14, 2026.

D. ~~Miscellaneous~~ Other Case Management Deadlines

1. Pre-Trial Deadlines and Pre-Trial Conference

- i. Any and all motions *in limine*, Daubert-type motions, witness and exhibit lists (including any deposition designations), and joint pretrial order must be filed no later than September 30, 2026.
- ii. A final pre-trial conference will be held in this Court on a date and time provided by the Court, no earlier than September 30, 2026.

2. Trial

- i. Unless the district court withdraws the reference, the trials of the Fraudulent Transfer Adversary Proceeding and the SubCon Adversary Proceeding will be held in this Court, whether or not those trials are conducted separately or combined. Such trials will begin on a date and time provided by the Court, no earlier than October 15, 2026.

E. Miscellaneous

- 1. Notwithstanding anything to the contrary in this Order, the deadlines specified herein may be extended by consent of the parties, except that leave of Court shall be required to alter, adjourn or extend the date of any hearing before the Court. As set forth in Paragraph C.vi. herein, the deadline to complete fact discovery will automatically be extended if any discovery objections and/or motion practice related to the scope of fact discovery remain unresolved as of the date set forth in Paragraph C.vi. to a date upon which resolution of and compliance with said resolution of the aforementioned fact discovery objections and/or motion practice is completed. In addition, upon a showing of good cause by any party and after notice and a hearing, the Court may alter or extend any of the deadlines specified

herein. The Court may consider whether the parties have complied with the terms of this Order when considering any request for a change in the deadlines.

2. Any party that does not consent to the Bankruptcy Court entering final judgment on all matters raised in the pleadings shall have 30 days from entry of this Order to file a motion to determine whether the Bankruptcy Court may enter a final judgment or order in any cause of action to which the non-consenting party does not consent to entry of a final judgment or order by the Bankruptcy Court. Such motion shall be accompanied by a memorandum of law in support of the motion.
3. THE FAILURE TO TIMELY MOVE TO DETERMINE WHETHER THE BANKRUPTCY COURT MAY ENTER A FINAL JUDGMENT OR ORDER WITH RESPECT TO ANY MATTER, ISSUE, OR CLAIM FOR RELIEF SHALL CONSTITUTE A WAIVER OF ANY RIGHT TO ADJUDICATION BY A COURT ESTABLISHED UNDER ARTICLE III OF THE UNITED STATES CONSTITUTION AND ANY RIGHT TO A JURY TRIAL, AND THE WAIVER SHALL BE DEEMED TO BE CONSENT TO HAVE THE BANKRUPTCY COURT ENTER FINAL JUDGMENT.
24. This Court shall retain ~~exclusive~~ jurisdiction over any and all matters arising from or related to the implementation, interpretation or enforcement of this Order.

~~This Order has been signed electronically. The Judge's signature and Court's seal appear at the top of the Order.~~ United States Bankruptcy Court

Summary report: Litera Compare for Word 11.12.0.83 Document comparison done on 10/2/2025 4:26:27 PM	
Style name: Default Style	
Intelligent Table Comparison: Active	
Original filename: Aldrich - CMO APs.docx	
Modified filename: Aldrich - Proposed Amended CMO APs(21186642.9).docx	
Changes:	
<u>Add</u>	32
Delete	11
Move From	0
<u>Move To</u>	0
<u>Table Insert</u>	0
Table Delete	1
<u>Table moves to</u>	0
Table moves from	0
Embedded Graphics (Visio, ChemDraw, Images etc.)	0
Embedded Excel	0
Format changes	0
Total Changes:	44

**UNITED STATES BANKRUPTCY COURT
WESTERN DISTRICT OF NORTH CAROLINA
CHARLOTTE DIVISION**

In re

ALDRICH PUMP LLC, *et al.*,¹

Debtors.

Chapter 11

Case No. 20-30608 (LMJ)

(Jointly Administered)

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS

Plaintiff,

Adv. Pro. No. 21-03029

v.

ALDRICH PUMP LLC, MURRAY BOILER
LLC, TRANE TECHNOLOGIES
COMPANY LLC, and TRANE U.S. INC.,

Defendants.

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS, on
behalf of the estates of Aldrich Pump LLC
and Murray Boiler LLC,

Plaintiff,

Adv. Pro. No. 22-03028

v.

INGERSOLL-RAND GLOBAL HOLDING
COMPANY LIMITED, TRANE
TECHNOLOGIES HOLDCO INC., TRANE
TECHNOLOGIES COMPANY LLC,
TRANE INC., TUI HOLDINGS INC.,
TRANE U.S. INC., and MURRAY BOILER
HOLDINGS LLC,

Defendants.

¹ The Debtors are the following entities (the last four digits of their respective taxpayer identification numbers follow in parentheses): Aldrich Pump LLC (2290) and Murray Boiler LLC (0679). The Debtors' address is 800-E Beaty Street, Davidson, North Carolina 28036.

OFFICIAL COMMITTEE OF ASBESTOS
PERSONAL INJURY CLAIMANTS on
behalf of the estates of Aldrich Pump LLC
and Murray Boiler LLC,

Plaintiff,

Adv. Pro. No. 22-03029

v.

TRANE TECHNOLOGIES PLC,
INGERSOLL-RAND GLOBAL HOLDING
COMPANY LIMITED, TRANE
TECHNOLOGIES HOLDCO INC., TRANE
TECHNOLOGIES COMPANY LLC,
TRANE INC., TUI HOLDINGS INC.,
TRANE U.S. INC., MURRAY BOILER
HOLDINGS LLC, SARA BROWN,
RICHARD DAUDELIN, MARC DUFOUR,
HEATHER HOWLETT, CHRISTOPHER
KUEHN, MICHAEL LAMACH, RAY
PITTARD, DAVID REGNERY, AMY
ROEDER, ALLAN TANANBAUM, EVAN
TURTZ, MANLIO VALDES, and ROBERT
ZAFARI

Defendants.

NOTICE OF HEARING

PLEASE TAKE NOTICE that on October 2, 2025, the Official Committee of Asbestos Claimants filed *Plaintiff's Motion to Amend Case Management Order* (the "Motion") in this case.

PLEASE TAKE FURTHER NOTICE that your rights may be affected by the Motion. You should read the Motion carefully and discuss them with your attorney. If you do not have an attorney, you may wish to consult with one.

PLEASE TAKE FURTHER NOTICE that, pursuant to Fed. R. Bankr. P. 9006 and the Case Management Order, written responses, if any, must be filed on or before October 26, 2025 (the "Response Deadline"), in order to be considered. If you do not want the Court to grant the relief requested in the Motion, or if you oppose it in any way, you MUST:

1. File a formal, written response with the Bankruptcy Court at:

Clerk, United States Bankruptcy Court
Charles Jonas Federal Building
401 West Trade Street
Charlotte, North Carolina 28202

2. Serve a copy of your response on all parties in interest, including:

- a) U.S. Bankruptcy Administrator
401 West Trade Street, Suite 2400
Charlotte, NC 28202
- b) HAMILTON STEPHENS STEELE + MARTIN, PLLC
Glenn C. Thompson
Robert A. Cox, Jr.
525 North Tryon Street, Suite 1400
Charlotte, North Carolina 28202
- c) ROBINSON & COLE LLP
Natalie D. Ramsey
Davis Lee Wright
1000 N. West Street, Suite 1200
Wilmington, Delaware 19801
- d) CAPLIN & DRYSDALE, CHARTERED
Kevin C. Maclay
Todd E. Phillips
Jeffrey A. Liesemer
One Thomas Circle NW, Suite 1100
Washington, DC 20005
- e) WINSTON & STRAWN LLP
Carrie V. Hardman
Cristina I. Calvar
200 Park Avenue
New York, New York 10166

PLEASE TAKE FURTHER NOTICE that a hearing on the Motion will be held on **October 23, 2025 at 9:30 a.m. (ET)** before the Honorable Lena M. James at the United States Bankruptcy Court, Charles Jonas Federal Building, Courtroom 2B, 401 West Trade Street, Charlotte, North Carolina 28202.

PLEASE TAKE FURTHER NOTICE that, if you or your attorney do not take these steps, the Court may decide that you do not oppose the relief sought in the Motion and may enter an Order granting the relief requested. No further notice of the hearing will be given.

[Signatures appear on the following page]

Dated: October 2, 2025

Respectfully submitted,

HAMILTON STEPHENS STEELE
+ MARTIN, PLLC

/s/ Robert A Cox, Jr.

Glenn C. Thompson (Bar No. 37221)

Robert A. Cox, Jr. (Bar No. 21998)

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