



Intellectual
Property
Owners
Association

PATENTS | TRADEMARKS | COPYRIGHTS
TRADE SECRETS | INDUSTRIAL DESIGNS

2023 ANNUAL MEETING

SEPTEMBER 10-12, 2023
HYNES CONVENTION CENTER | BOSTON, MA



FEATURING KEYNOTE SPEAKERS



Shira Perlmutter

Register of Copyrights, US Copyright Office



Kathi Vidal

Director, US Patent and Trademark Office

This must-attend event brings together IP professionals from corporations, law firms, government, academia, and service providers from around the world to discuss strategies, trends, and best practices. The annual meeting offers a mix of educational programs, committee meetings, networking opportunities, and exhibits.

www.ipo.org/AM2023



Program at a Glance

Time (ET)	Sunday, Sept. 10	Monday, Sept. 11	Tuesday, Sept. 12
6:15 a.m.			
6:30 a.m.		Fun Run/Walk (Sheraton Hotel)	
7:00 a.m.			
7:30 a.m.		Breakfast/IP Expo	Chief IP Counsel Breakfast <i>by invitation</i>
8:00 a.m.	IPO Board Strategic Planning Meeting <i>Board Members only</i>	Concurrent Sessions – AI: Legal Considerations for Feeding the Machine – When Good Trademarks Go Bad	Breakfast/IP Expo
8:30 a.m.			
9:00 a.m.		Fireside Chat with Director Kathi Vidal US Patent and Trademark Office	Workshops – Crossover Between Data and IP – Start-ups and SMEs
9:15 a.m.			
9:30 a.m.			Concurrent Sessions – Data Handling – Use of AI/chatGPT in Patent Prosecution – Fair Use
10:00 a.m.		Coffee Break	
10:15 a.m.			Coffee Break
10:30 a.m.			
11:00 a.m.			Concurrent Sessions – Generative AI Tools – Using the ITC and Section 337 to Protect Brands – Designs: Hot Precedential/ Paradigm Shift
11:15 a.m.			
12:00 p.m.			Keynote Address by Director Shira Perlmuter, US Copyright Office
12:30 p.m.			Lunch/IP Expo
1:00 p.m.	Networking Event Hosted by IPO's Women in IP Law Committee		
1:30 p.m.		Workshops – KPI Reference Guide – Patent Agents	Concurrent Sessions – TM Issues Created by Emerging Tech – Compulsory Licensing – Mental Health
2:00 p.m.			
2:15 p.m.	Committee Business Meetings	Concurrent Sessions – Generative AI & Copyrights – Functional Claiming – International Design: Hague	Coffee Break
2:30 p.m.			
2:45 p.m.			
3:00 p.m.			IPOEF Board Meeting <i>Board Members only</i>
3:15 p.m.		Concurrent Sessions – When Biotech met TechBio – Extraterritorial Issues in TM Law – Playing Defense (Taint)	
3:30 p.m.	Coffee Break		
3:45 p.m.	Committee Business Meetings		
4:00 p.m.		Concurrent Sessions – Patent Case Law Update – Ethics – Design Law & Policy Update	Coffee Break
4:15 p.m.			
4:30 p.m.			
4:45 p.m.	Opening Session Inside View of IP and Government		Concurrent Sessions – Trade Secrets Under Pressure – Protection of Design Rights in the Virtual World – UPC
5:00 p.m.			
5:30 p.m.			
6:00 p.m.	Welcome Reception	Networking Event Hosted by IPO's D&I Committee and Resource Groups (Sheraton Hotel)	Adjourn
6:30 p.m.			
7:00 p.m.		Dinner Reception at the Museum of Science	CIPA Reception/Program (Sheraton Hotel)
7:30 p.m.	Board/Speaker Dinner (Sheraton Hotel) <i>by invitation</i>		
8:00 p.m.			
8:30 p.m.			
9:00 p.m.			
9:30 p.m.			

2023 ANNUAL MEETING

BOSTON, MA





Program of Events

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All events will take place at the Hynes Convention Center unless otherwise noted.

Sunday, September 10

<u>TIME</u>	<u>FUNCTION</u>		
8:00AM 12:30PM	IPO Board of Directors Strategic Planning Meeting <i>IPO Board Members and Alternates Only</i>		
1:00PM 2:00PM	Networking Social Event hosted by the Women in IP Law Committee <i>Sponsored in part by Dennemeyer IP Group</i>		
	<u>Speakers:</u> Sandra Nowak, 3M Innovative Properties Co. Robin Evans, US Patent & Trademark Office Miriam Lord, US Copyright Office		
2:15PM 3:15PM	Committee Business Meetings <ul style="list-style-type: none"> ▪ Anti-Counterfeiting & Anti-Piracy ▪ Asian Practice (<i>note: this committee meeting is scheduled from 2:15-4:15pm</i>) ▪ Copyright & Related Rights ▪ Diversity & Inclusion ▪ International Trademark Law & Practice <ul style="list-style-type: none"> • Guest Speaker: David Muls, Senior Director, Brands and Designs Sector, Madrid Registry, WIPO ▪ Latin American Practice ▪ Pharmaceutical & Biotechnologies Issues ▪ Software Related Inventions ▪ U.S. Patent Law ▪ U.S. Post Grant Patent Office Practice 		
3:30PM 4:30PM	Committee Business Meetings <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> ▪ AI & New Emerging Technologies ▪ Canadian Practice ▪ Corporate IP Management & Operations ▪ European Practice ▪ Industrial Designs ▪ IP Licensing & Related Issues ▪ Leadership Development </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> ▪ Patent Agent ▪ Patent Litigation & Remedies ▪ Trade Secrets ▪ U.S. Patent Office Practice ▪ U.S. Trademark Law ▪ U.S. Trademark Office Practice ▪ Women in IP Law </td> </tr> </table>	<ul style="list-style-type: none"> ▪ AI & New Emerging Technologies ▪ Canadian Practice ▪ Corporate IP Management & Operations ▪ European Practice ▪ Industrial Designs ▪ IP Licensing & Related Issues ▪ Leadership Development 	<ul style="list-style-type: none"> ▪ Patent Agent ▪ Patent Litigation & Remedies ▪ Trade Secrets ▪ U.S. Patent Office Practice ▪ U.S. Trademark Law ▪ U.S. Trademark Office Practice ▪ Women in IP Law
<ul style="list-style-type: none"> ▪ AI & New Emerging Technologies ▪ Canadian Practice ▪ Corporate IP Management & Operations ▪ European Practice ▪ Industrial Designs ▪ IP Licensing & Related Issues ▪ Leadership Development 	<ul style="list-style-type: none"> ▪ Patent Agent ▪ Patent Litigation & Remedies ▪ Trade Secrets ▪ U.S. Patent Office Practice ▪ U.S. Trademark Law ▪ U.S. Trademark Office Practice ▪ Women in IP Law 		
4:45PM 6:00PM	Opening Session and IPO Awards Presentation Welcome Remarks and Awards Presented by: Karen Cochran, Shell USA, Inc., IPO President		
	Opening Session: Inside View of IP and Government This session will provide an inside view of how IP law is shaped by the courts and administration. Speakers will discuss how they operate, what their respective roles are, and how they interact with each other, Congress and the public. Deputy Solicitor of the US Patent and Trademark Office (USPTO), former judge for the US Court of Appeals for the Federal Circuit, and former Director of the USPTO will provide an insider view of what happens in government when it comes to intellectual property, as well as thoughts on some of the latest cases and trends.		
	<u>Speakers:</u> Andrei Iancu, Sullivan and Cromwell Hon. Kathleen O'Malley, Sullivan and Cromwell Farheena Rasheed, US Patent & Trademark Office		

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Sunday, September 10 (continued)

<u>TIME</u>	<u>FUNCTION</u>
6:00PM 8:00PM	Welcome Reception <i>Sponsored by Ropes & Gray LLP</i>
7:00PM 8:30PM	IPO Board of Directors and Special Guests Dinner <i>By invitation only; Location: Sheraton Hotel</i>

Monday, September 11

<u>TIME</u>	<u>FUNCTION</u>
6:30AM 7:30AM	IPO Fun Run/Walk <i>Sponsored by Banner Witcoff</i> <i>Note: Grab and go breakfast will be provided; Location: Sheraton Hotel</i>
7:00AM 8:00AM	Breakfast & IP Expo <i>Breakfast sponsored by Leydig, Voit & Mayer, Ltd.</i>
8:00AM 9:00AM	Welcome & Concurrent Sessions <ul style="list-style-type: none"> ▪ AI: Decentralized Machine Learning: Why It Matters and How to Protect It <u>Speakers:</u> Harleen Khanijoun, Gowling WLG (Canada) LLP Shankar Krithivasan, Qualcomm Incorporated John Osha, Osha Bergman Watanabe & Burton LLP Nick Transier, Dinsmore & Shohl LLP ▪ Trademarks: When Good Trademarks Go Bad <u>Speakers:</u> Makiko Coffland, Christensen O'Connor Johnson Kindness PLLC Victoria Longshaw Matt Owen, Caterpillar Anthony Prenol, CPST Intellectual Property
9:00AM 9:30AM	Fireside Chat with Kathi Vidal, Under Secretary of Commerce for Intellectual Property and Director of the US Patent and Trademark Office  Kathi Vidal serves as the Under Secretary of Commerce for Intellectual Property and Director of the United States Patent and Trademark Office (USPTO). As the chief executive of the USPTO, she leads one of the largest intellectual property offices in the world. She is the principal IP advisor to the President and the Administration, through the Secretary of Commerce, and is focused on incentivizing and protecting U.S. innovation, entrepreneurship, and creativity. She leads an agency whose mission is to help American workers and businesses compete and collaborate, especially in ground-breaking technologies and across all demographics.
9:30AM 10:15AM	Break & IP Expo <i>Break sponsored by Leydig, Voit & Mayer, Ltd.</i> IP Hub Presentation: 9:40am-9:55am Strategic Decision Making - Maximizing Success with an Integrated IP Management Solution <u>Speaker:</u> Vincent Brault, Anaqua

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Monday, September 11 (continued)

<u>TIME</u>	<u>FUNCTION</u>
10:15AM 11:15AM	<p>General Session: Increasing Lead Trial Counsel Diversity</p> <p><u>Speakers:</u> Brian Brookey, Tucker Ellis LLP Kassie Helm, Dechert LLP Sapna Palla, Allen & Overy, LLP Nichole Valeyko, Merck & Co. Inc.</p>
11:15AM 12:00PM	<p>Keynote Address by Shira Perlmutter, Register of Copyrights and Director of the US Copyright Office</p>  <p>Shira Perlmutter is the Register of Copyrights and Director of the U.S. Copyright Office. Appointed in October 2020, Perlmutter advises Congress and executive branch agencies on copyright policy and directs the administration of important provisions of the U.S. Copyright Act, leading a workforce of nearly 500 employees.</p>
12:00PM 2:00PM	<p>Lunch & IP Expo Lunch will be provided in the IP Expo Hall during this two-hour time frame. There are several activities during this time frame for attendees to choose from (listed below). Note: space is limited. Attendees may also use this extended time to network with colleagues or catch up on work.</p> <p>IP Hub Presentation: 12:40pm-12:55pm GenAI and the Future of Patent Development <u>Speaker:</u> Ian Schick, Ethan Nathaniel, Inc.</p> <p>IP Hub Presentation: 1:05pm-1:20pm JPO as Your Business Partner <u>Speaker:</u> Atsushi Hiruta, Japan Patent Office</p> <p>IP Hub Presentation: 1:30pm-1:45pm Recent Updates on Startups' IP Activities in Japan <u>Speaker:</u> Yukihiro Takemoto, JPAA International Activities Center</p> <p>Committee Business Meeting: 12:00pm-1:00pm International Patent Law and Trade <u>Guest Speaker:</u> Matt Bryan, Director, Patents and Technology Sector, PCT Legal and International Affairs Department, PCT Legal and User Relations Division, WIPO</p> <p>Workshop: 1:00pm-2:00pm Using Key Performance Indicators (KPIs) to Leverage Your IP and Manage More Effectively <u>Facilitators:</u> Peter Mattei, Tenneco Inc.; Jayne Piana, Fletcher Yoder; Brad Van Pelt, Banner & Witcoff, Ltd.; Carrie Webb Olson, Day Pitney LLP; and Laura Zager, Thermo Fisher Scientific Inc.</p> <p>Workshop: 1:00pm-2:00pm Unraveling Titles, Credentials, and Capabilities to Promote Effective Practitioner Collaboration in Your Organization <u>Speakers:</u> Kate Helmich, Cargill, Incorporated; Jakob Kellenberger, Procter & Gamble Co.; and Dan Staudt, Siemens Corp.</p>





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Monday, September 11 (continued)

<u>TIME</u>	<u>FUNCTION</u>
2:15PM 3:15PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>AI/Copyrights: Generative AI & Copyrights: Eligibility, Fair Use, and Liability</p> <p><u>Moderator:</u> Jenevieve Maerker, Finnegan, Henderson, Farabow, Garrett & Dunner LLP</p> <p><u>Speakers:</u> Troy Prince, Raytheon Technologies Edward Ryan, Tutunjian & Bitetto P.C. Prof. Jessica Silbey, Boston University Barry Sookman, McCarthy Tétrault</p> <p>Patents: The Current Status and Future of Functional Claiming, Enablement, and Sufficiency after <i>Amgen v. Sanofi</i></p> <p><u>Moderator:</u> Christopher George, Hanley, Flight & Zimmerman</p> <p><u>Speakers:</u> Roy Issac, Bristol-Myers Squibb Company Prof. Jeffrey Lefstin, UC Law San Francisco Cynthia McCaskill, GE Aerospace Mercedes Meyer, Banner & Witcoff, Ltd.</p> <p>Industrial Designs: International Design: To Hague or Not To Hague?</p> <p><u>Moderator:</u> Bart Fisher, Caterpillar</p> <p><u>Speakers:</u> Gregoire Bisson, World Intellectual Property Organization Tracy-Gene Durkin, Sterne, Kessler, Goldstein & Fox, PLLC Sabine Kossak, Olbricht Patentanwälte</p>
3:15PM 4:00PM	<p>Break & IP Expo <i>Break sponsored by Leydig, Voit & Mayer, Ltd.</i></p> <p>IP Hub Presentation: 3:20pm-3:55pm Streamlining Foreign Filing Processes by Adopting Technologies That Make the Difference <u>Speaker:</u> Jose Figueroa, SHIP Global IP</p>
4:00PM 5:00PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>Patents: Patent Case Law Update</p> <p><u>Moderator:</u> Erika Arner, Finnegan, Henderson, Farabow, Garrett & Dunner, LLP</p> <p><u>Speakers:</u> Tom Brown, Dell Technologies Jessica Marks, Unified Patents Shital Shah, Caterpillar</p>





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Monday, September 11 (continued)

<u>TIME</u>	<u>FUNCTION</u>
4:00PM 5:00PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> ▪ The 7 Cs of Legal Ethics <u>Speaker:</u> Michael Kennedy, Vermont Judiciary ▪ Industrial Designs: Design Law & Policy Update <u>Moderator:</u> Dunstan Barnes, McAndrews, Held & Malloy, Ltd. <u>Speakers:</u> Kerith Kanaber, Dorsey & Whitney, LLP Jann Moore, Caterpillar Ryan Sandroock, Shook Hardy & Bacon LLP
5:30PM 6:30PM	<p>Networking Reception hosted by IPO's Diversity & Inclusion Committee and Resource Groups <i>Location: Sheraton Hotel</i></p>
7:00PM 9:30PM	<p>Special Event: Dinner Reception at the Museum of Science <i>Sponsored by Finnegan, Henderson, Farabow, Garrett & Dunner, LLP</i> <i>Busses transportation provided between the Sheraton Hotel and the Museum of Science. Buses will begin departing the hotel at 6:30pm. The last bus will return to the hotel by 10:00pm.</i></p>

Tuesday, September 12

<u>TIME</u>	<u>FUNCTION</u>
7:00AM 8:00AM	<p>Chief IP Counsel Breakfast <i>By invitation only</i></p>
7:30AM 9:00AM	<p>Breakfast & IP Expo <i>Breakfast sponsored by Schwegman Lundberg & Woessner, P.A.</i></p>
8:00AM 9:00AM	<p>Workshops</p> <ul style="list-style-type: none"> ▪ Crossover Between Data and IP <u>Speakers:</u> Kaveh Rashidi-Yazd and Joy Johns, Eaton Corporation Karen Cochran and Daniel Schuch, Shell USA Inc. ▪ Collaborations with Start-ups and SMEs <u>Moderator:</u> Ray Farrell, Carter, DeLuca, Farrell LLP <u>Speakers:</u> Matt Bryan, World Intellectual Property Organization Jessica Ergmann, Broad Institute Jim Freedman, MIT Venture Mentoring Service Outreach Program Elizabeth Lester, Equifax





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Tuesday, September 12 (continued)

TIME

FUNCTION

9:15AM
10:15AM

Concurrent Sessions

- **Patents/AI:** Use of AI/chatGPT in Patent Prosecution

Moderator: Ron Ventola, Panitch Schwarze Belisario & Nadel LLP

Speakers:

Joshua Davenport, Banner & Witcoff, Ltd.
Ann McCrackin, Patent Bots
Hersh Mehta, Hewlett Packard Enterprise

- **Copyrights/Trademarks:** Fair Use

Moderator: Sarah O’Grady, CPST Intellectual Property

Speakers:

Paul Mussell, Wells Fargo
Chris Ott, Capital One
Prof. Alfred C. Yen, Boston College Law School

- **Data Licensing:** Data Handling: Generative AI/Privacy/Cyber Security

Moderator: Jennifer Carnahan, The Dow Chemical Company

Speakers:

Brian Adams, Qualcomm Incorporated
David Bomzer, Cantor Colburn
Andrew Wilson, Baker Botts

10:15AM
11:00AM

Break & IP Expo

Coffee Break sponsored by Schwegman Lundberg & Woessner, P.A.

IP Hub Presentation: 10:20am-10:35am

Unlocking Global Patent Value – Smart Strategies for Building a Strong Portfolio within Budget Considerations

Speaker: Eric Satermo, Questel

IP Hub Presentation: 10:40am-10:55am

Information coming soon.

Speaker: *to be announced*, IP Rally





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Tuesday, September 12 (continued)

<u>TIME</u>	<u>FUNCTION</u>
11:00AM 12:00PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>Industrial Designs: Hot Precedential/Paradigm Shift: <i>GM v. LKQ</i></p> <p><u>Moderator:</u> Elizabeth Ferrill, Finnegan, Henderson, Farabow, Garrett & Dunner LLP</p> <p><u>Speakers:</u> Brendan O’Dea, Womble Bond Dickinson LLP Perry Saidman, Saidman Design Law Group</p> <p>Trademarks: Using the ITC and Section 337 to Protect Valuable Brands</p> <p><u>Speakers:</u> Christopher Renk, Arnold & Porter LLP Kecia Reynolds, Paul Hastings LLP Dan Valencia, DLA Piper LLP</p> <p>AI: Generative AI Tools: Considerations, Risks, Pitfalls, and Best Practices for Business Use</p> <p><u>Moderator:</u> Laura Zager, Thermo Fisher Scientific Inc.</p> <p><u>Speakers:</u> Jill Abasto, Qualcomm Incorporated Deepika Bhayana, Dell Technologies Sumon Dasgupta, Jordan IP Law, LLC Renee Fuller, Bristol-Myers Squibb Company</p>
12:00PM 1:00PM	<p>Lunch & IP Expo</p>
1:00PM 2:00PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>Patents: Concerning Developments That Could Impact the IP Ecosystem (e.g. Compulsory Licensing)</p> <p><u>Moderator:</u> Sharon Reiche, Pfizer Inc.</p> <p><u>Speakers:</u> Dan Enebo, Cargill, Incorporated Julie M. Lake, Merck & Co., Inc. Laurence Loumes, Plasseraud IP Roberto Rodrigues Pinho, Licks Attorneys</p>





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Tuesday, September 12 (continued)

<u>TIME</u>	<u>FUNCTION</u>
1:00PM 2:00PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>Mental Health: Mental Health in the Legal Profession</p> <p><u>Moderator:</u> Sandra Nowak, 3M Innovative Properties Co.</p> <p><u>Speakers:</u> Andrew Currier, Perry + Currier Inc. Shawn Healy, Lawyers Concerned for Lawyers, Inc. Rachael Rodman, Ulmer & Berne, LLP</p> <p>Trademarks/AI: Trademark Issues Created by Emerging Tech</p> <p><u>Moderator:</u> Jake Feldman, Kenvue</p> <p><u>Speakers:</u> Pete Becker, Christensen, O'Connor, Johnson & Kindness Jon Jekel, Pillsbury Winthrop Shaw Pittman, LLP Kim Maynard, Frankfurt Kurnit Klein & Selz P.C.</p>
2:00PM 2:45PM	<p>Break & IP Expo <i>Coffee Break sponsored by Schwegman Lundberg & Woessner, P.A.</i></p>
2:00PM 4:00PM	<p>IPO Education Foundation Board of Directors Meeting <i>Board members only</i></p>
2:45PM 3:45PM	<p>Concurrent Sessions</p> <ul style="list-style-type: none"> <p>Trade Secrets: Trade Secret Considerations: Avoiding, Detecting, & Limiting Tainted Info in R&D Programs</p> <p><u>Speakers:</u> Monica Baig-Silva, Thermo Fisher Scientific Inc. Leland Gardner, Google, LLC John Williamson, Finnegan, Henderson, Farabow, Garrett & Dunner LLP</p> <p>AI: When Biotech Met TechBio: Collaborations and Agreements at the Interface of AI Drug Discovery</p> <p><u>Moderator:</u> Nicholas Malden, D Young & Co LLP</p> <p><u>Speakers:</u> Eric Lin, Genentech Alexander Korenberg, Kilburn & Strode LLP Arthur Shum, Eli Lilly & Co.</p> <p>Trademarks: Extraterritoriality Issues in Trademark Law</p> <p><u>Speakers:</u> Jered Matthyse, Pirkey Barber PLLC Dennis Prah, Ladas & Parry Mike Sweeney, Corsearch</p>





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Tuesday, September 12 (continued)

<u>TIME</u>	<u>FUNCTION</u>
3:45PM 4:30PM	Break & IP Expo <i>Coffee Break sponsored by Schwegman Lundberg & Woessner, P.A.</i>
4:30PM 5:30PM	Concurrent Sessions <ul style="list-style-type: none"> ▪ Patents: Unified Patent Court Opens its Doors: Early Observations and Outcomes <u>Moderator:</u> David Black, Schwegman, Lundberg & Woessner, P.A. <u>Speakers:</u> Kimberly Chotkowski, Brandywine Ventures Kevin Ecker, Philips IP & Standards Volkmar Henke, Bardehle Pagenberg Partnerschaft MbB Agathe Michel-de Cazotte, Carpmaels & Ransford LLP ▪ Trade Secrets: Trade Secrets Under Pressure from the Winds of Public Policies <u>Speakers:</u> Kenneth Corsello, IBM Corp. Dawn Mertineit, Seyfarth Shaw LLP Tom Valente, Intellectual Property Owners Association ▪ Industrial Designs: Protection of Design Rights in the Virtual World <u>Moderator:</u> Ashwani Balayan, ALG India Law Offices LLP <u>Speakers:</u> Mike Binns, Meta Jeremy Kriegel, Marshall, Gerstein & Borun LLP Ude Lu, Purplevine IP
6:00PM 8:00PM	Reception hosted by The Chartered Institute of Patent Attorneys (CIPA) The Chartered Institute of Patent Attorneys is hosting a networking reception at the Sheraton Hotel. IPO Annual Meeting attendees are invited. There is no charge to attend this reception.





Patent, Trade Secret, and Data Licensing

The Current Status and Future of Functional Claiming, Enablement, and Sufficiency after *Amgen v. Sanofi*

Monday, September 11, 2:15-3:15pm ET

This session will look at functional claiming strategies, their history, and their use in the bio/pharma and software fields. Speakers will also examine enablement and sufficiency concepts in patent law and how they may be affected by the *Amgen v. Sanofi* decision.

Organizing Committees: Pharmaceutical & Biotechnology Issues, US Patent Law, and Software Related Inventions

Moderator: Christopher George, Hanley, Flight & Zimmerman

Speakers:

Roy Issac, Bristol-Myers Squibb Company
Prof. Jeffrey Lefstin, UC Law San Francisco
Alex Long, GE Aerospace
Mercedes Meyer, Banner & Witcoff, Ltd.

Patent Case Law Update

Monday, September 11, 4:00-5:00pm ET

Wondering if you missed anything important in court and PTAB patent decisions this year? This session will fill you in on the highlights and speakers will provide their key takeaways from decisions that really stood out for them. For example, *PMC v. Apple* and considerations for continuation practice, weighing estoppel implications between PTAB proceedings and other office proceedings and district court, and what *In re Cellect* means for portfolio management. The panelists will also discuss big issues on the horizon to watch.

Organizing Committees: Amicus Brief and US Post-Grant Patent Office Practice

Moderator: Erika Arner, Finnegan, Henderson, Farabow, Garrett & Dunner, LLP

Speakers:

Tom Brown, Dell Technologies
Jessica Marks, Unified Patents
Shital Shah, Caterpillar

2023 ANNUAL MEETING

BOSTON, MA





Patent, Trade Secret, and Data Licensing

Use of AI/ChatGPT in Patent Prosecution

Tuesday, September 12, 9:15-10:15am ET

ChatGPT and other AI programs are rising in prominence over time. These programs hold out the possibility of complex searching of large databases, such as databases of patent documents or other publications, reporting the results of a search, and even (perhaps) analyzing the substance of the results or evaluating rejections based on a combination of references. Speakers will discuss the current capabilities of these programs, including the practical, legal, and ethical issues presented by various uses of such programs in patent prosecution.

Organizing Committee: US Patent Office Practice

Moderator: Ron Ventola, Panitch Schwarze Belisario & Nadel LLP

Speakers:

Joshua Davenport, Banner & Witcoff, Ltd.
Ann McCrackin, Patent Bots
Hersh Mehta, Hewlett Packard Enterprise

Data Handling: Generative AI/Privacy/Cyber Security

Tuesday, September 12, 9:15-10:15am ET

This session will provide an update on federal and state legislation, as it pertains to the use of personal data and other protected information, including but not limited to training generative AI models, and other privacy and cyber security implications. The session will also include the status and potential ramifications of President Biden's Executive Order on Improving the Nation's Cybersecurity (May 12, 2021), particularly with regard to requirements for federal software vendors to "self-attest" to the security of their products and to potentially provide a software bill of materials (SBOM).

Organizing Committee: IP Licensing & Related Issues

Moderator: Jennifer Carnahan, The Dow Chemical Company

Speakers:

Brian Adams, Qualcomm Incorporated
David Bomzer, Cantor Colburn
Andrew Wilson, Baker Botts





Patent, Trade Secret, and Data Licensing

Concerning Developments That Could Impact the IP Ecosystem (e.g. Compulsory Licensing)

Tuesday, September 12, 1:00-2:00pm ET

This session will explore recent developments in various jurisdictions, including in multilateral fora, that seek to modify the IP framework and the concern that these proposals will undermine the stability and predictability of the IP ecosystem. Speakers will discuss the EU Compulsory Licensing legislative proposal, the WHO pandemic treaty draft, the latest developments related to the WTO TRIPS modification debate, and country-level developments. The panel will address the potential impact such legislation/proposals/actions could have on various forms of technology (e.g., medicines and green technology), including on innovation and partnerships in those fields, and provide insight into steps IPO members can take to help frame a positive, evidence-based IP narrative.

Organizing Committees: Asian Practice, European Practice, International Patent Law & Trade, Latin American Practice, Green IP Subcommittee, Pharmaceutical & Biotechnology Issues

Moderator: Sharon Reiche, Pfizer Inc.

Speakers:

Dan Enebo, Cargill, Incorporated

Julie M. Lake, Merck & Co., Inc.

Laurence Loumes, Plasseraud IP

Roberto Rodrigues Pinho, Licks Attorneys

Trade Secret Considerations: Avoiding, Detecting, and Limiting Tainted Information in R&D Programs

Tuesday, September 12, 2:45-3:45pm ET

This session will provide an overview of what taint is and why it is a problem. Speakers will discuss suggestions for avoiding taint during the development process, including key strategies for employee onboarding, management of development process, and education of development teams.

Organizing Committee: Trade Secrets

Speakers:

Monica Baig-Silva, Thermo Fisher Scientific Inc.

Leland Gardner, Google, LLC

John Williamson, Finnegan, Henderson, Farabow, Garrett & Dunner LLP





Patent, Trade Secret, and Data Licensing

Trade Secrets Under Pressure from the Winds of Public Policy

Tuesday, September 12, 4:30-5:30pm ET

With proprietary information continuing to grow in importance and value as an asset across the world, trade secrets have recently been the focus of new enacted and proposed laws and regulations. This session will consider laws – such as the EU AI Act, EU Data Act, right to repair laws, TRIPS/WTO IP waiver, and privacy laws – that could compel owners of trade secrets to provide the otherwise secret information to governments, consumers and competing companies. Speakers will discuss increasingly restrictive government policies that limit the flow of information to certain nations (e.g., Chips and Science Act), and efforts to use trade laws and other mechanisms to penalize trade secret theft (e.g., Protecting Intellectual Property Act of 2022). In addition, this panel will also address the push in the US to reduce employee non-compete restrictions, which have the goal of increasing employee mobility but which make it harder for companies to protect trade secrets.

Organizing Committee: Trade Secrets

Speakers:

Kenneth Corsello, IBM Corp.
Dawn Mertineit, Seyfarth Shaw LLP
Tom Valente, Intellectual Property Owners Association

Unified Patent Court Opens Its Doors: Early Observations and Outcomes

Tuesday, September 12, 4:30-5:30pm ET

This session will address the implications of early litigations and developments in the new UPC system which opened its doors on June 1, 2023. Speakers will address the initial resolutions and court rulings including preliminary injunctions and the use of central authority nullification proceedings and post litigation opt outs.

Organizing Committees: European Practice and Patent Litigation & Remedies

Moderator: David Black, Schwegman, Lundberg & Woessner, P.A.

Speakers:

Kimberly Chotkowski, Brandywine Ventures
Kevin Ecker, Philips IP & Standards
Volkmar Henke, Bardehle Pagenberg Partnerschaft MbB
Agathe Michel-de Cazotte, Carpmiels & Ransford LLP

2023 ANNUAL MEETING

BOSTON, MA





Artificial Intelligence Sessions

Decentralized Machine Learning: Why It Matters and How to Protect It

Monday, September 11, 8:00–9:00am ET

Machine learning (ML) is a notoriously resource-intensive task in which access to massive amounts of training data and compute remain difficult (and expensive) bottlenecks. By way of example, it is reported that training a large language model like “ChatGPT” requires billions of data points, months of training time, and millions of dollars. Decentralized (or distributed) machine learning (DML) techniques offer relief on several fronts. In particular, DML leverages the compute and training data of numerous decentralized entities to train ML models collaboratively while, critically, protecting each entity’s private data. DML thus has wide ranging applications in healthcare, blockchain, IoT, telecommunications, multimedia, and others. This session will introduce DML. Speakers will discuss why DML is important, and consider the challenges of protecting DML innovations from a patent practitioner’s perspective.

Organizing Committee: AI & New Emerging Technologies

Speakers:

Harleen Khanijoun, Gowling WLG (Canada) LLP
Shankar Krithivasan, Qualcomm Incorporated
John Osha, Osha Bergman Watanabe & Burton LLP
Nick Transier, Dinsmore & Shohl LLP

Generative AI & Copyrights: Eligibility, Fair Use, and Liability

Monday, September 11, 2:15–3:15pm ET

The use of creative content like artwork, photographs, textual materials and musical recordings to train machine learning models, which in turn enable various AI tools and services, raises complex and unique issues regarding the ownership and authorship of AI-generated content, the use of copyrighted materials and the applicability of the fair use doctrine or other defenses. The panel will examine these issues, including addressing recent copyright infringement suits asserting that using images to train AI services infringes copyright and discussing the potential defenses to these infringement actions.

Organizing Committees: AI & New Emerging Technologies and Copyright & Related Issues

Moderator: Jenevieve Maerker, Finnegan, Henderson, Farabow, Garrett & Dunner LLP

Speakers:

Prof. Jessica Silbey, Boston University
Troy Prince, Raytheon Technologies
Edward Ryan, Tutunjian & Bitetto P.C.
Barry Sookman, McCarthy Tétrault

2023 ANNUAL MEETING

BOSTON, MA





Artificial Intelligence Sessions

Use of AI/ChatGPT in Patent Prosecution

Tuesday, September 12, 9:15-10:15am ET

ChatGPT and other AI programs are rising in prominence over time. These programs hold out the possibility of complex searching of large databases, such as databases of patent documents or other publications, reporting the results of a search, and even (perhaps) analyzing the substance of the results or evaluating rejections based on a combination of references. Speakers will discuss the current capabilities of these programs including the practical, legal, and ethical shortcomings of using such programs in patent prosecution.

Organizing Committee: US Patent Office Practice

Moderator: Ron Ventola, Panitch Schwarze Belisario & Nadel LLP

Speakers:

Joshua Davenport, Banner & Witcoff, Ltd.

Ann McCrackin, Patent Bots

Hersh Mehta, Hewlett Packard Enterprise

Generative AI Tools: Considerations, Risks, Pitfalls, and Best Practices for Business Use

Tuesday, September 12, 11:00am–12:00pm ET

We live in an exciting time today, with the introduction of a new generation of AI tools based on Large Language Models (LLMs) such as ChatGPT and Bard that will drastically re-shape the industry landscape and how we work. As the public comes to terms with the capabilities of these tools, company leaders in industries well beyond high tech and media have had to learn what the technology is, how it can be used, and how it might affect their businesses. Employees in a wide range of roles are wondering whether and how they can leverage generative AI tools in their jobs. Legal departments are tasked with setting parameters of use that allow companies to take advantage of everything AI has to offer while protecting the company's valuable IP rights, guarding against infringement risks relating to AI system inputs, and protecting AI system outputs. In the quickly evolving technological and legal landscape, companies are seeking to develop legal policies and guidance to align employee behavior with current best practices. Speakers will discuss the legal risk associated with using these tools, their limitations, and potential pitfalls. They will also share lessons learned, best practices, and practical considerations for developing a company policy for use of AI tools internally and for commercial offerings.

Organizing Committees: AI & New Emerging Technologies, Copyright & Related Issues, Corporate IP Management & Operations, US Patent Law, and Software Related Inventions

Moderator: Laura Zager, Thermo Fisher Scientific Inc.

Speakers:

Jill Abasto, Qualcomm Incorporated

Deepika Bhayana, Dell Technologies

Sumon Dasgupta, Jordan IP Law, LLC

Renee Fuller, Bristol-Myers Squibb Company

2023 ANNUAL MEETING

BOSTON, MA





Artificial Intelligence Sessions

Trademark Issues Created by Emerging Tech

Tuesday, September 12, 1:00–2:00pm ET

This session will consider new issues related to emerging technologies that impact brand protection, including blockchain domain names, virtual worlds, and the impact of artificial intelligence. Speakers will discuss the following topics:

- Blockchain domain names: An overview of what blockchain domain names are, how they are being used by brands and others, what brand owners can do to protect themselves now against bad faith registration of their brands as domain names across several different blockchains, and what solutions brand owners might expect to arise in the future.
- Trademark issues involving AI: A discussion regarding the impact – or expected impact – of AI, generative or otherwise, on brand protection and related issues such as right of publicity, and threats and opportunity for brand owners, including the impact of AI on traditional trademark clearance and brand protection, and the use of AI by trademark service providers.
- Other trademark issues arising in the virtual world, including in augmented reality, and to what extent these issues require policing and enforcement best practices that differ from traditional strategies.

Organizing Committees: US Trademark Law and International Trademark Law and Practice

Moderator: Jake Feldman, Kenvue

Speakers:

Pete Becker, Christensen, O'Connor, Johnson & Kindness
Jon Jekel, Pillsbury Winthrop Shaw Pittman, LLP
Kim Maynard, Frankfurt Kurnit Klein & Selz P.C.

When Biotech Met TechBio: Collaborations and Agreements at the Interface of AI Drug Discovery

Tuesday, September 12, 2:45-3:45pm ET

Collaboration between big pharma and healthcare companies and AI startups are continuously on the rise and driving much of the innovation sector. This represents interesting challenges for in-house legal advisers and their outside counsel. The players involved have very different outlooks in terms of business strategy, appetite for risk and culture. In turn that leads to different approaches to IP strategy and agreements. In addition to IP strategy, probably the most important area where this can be seen is in respect of use and ownership of data, the fuel on which any AI project runs. This session will begin with a brief overview of current technology trends. Speakers will provide insights on what happens when Biotech meets TechBio, focusing on how different approaches to IP strategy and agreements, in particular on data, can be reconciled to facilitate successful collaboration and navigate some of the pitfalls.

Organizing Committees: AI & New Emerging Technologies and Pharmaceutical & Biotechnology Issues

Moderator: Nicholas Malden, D Young & Co LLP

Speakers:

Eric Lin, Genentech
Alexander Korenberg, Kilburn & Strode LLP
Arthur Shum, Eli Lilly & Co.

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Trademark & Copyright Sessions

When Good Trademarks Go Bad

Tuesday, September 12, 8:00am-9:00am ET

While it can sometimes take decades to create a famous or well-known trademark, the goodwill in a trademark can in some circumstances be destroyed within a fraction of that time. This session will focus on current global trends that can negatively affect the reputation of a successful trademark. Speakers will focus on topics such as online culture, viral sensations and memes, parodies, fallout from over-aggressive enforcement, dilution, and counterfeit goods, across international borders. They will discuss strategies for defensive registration, use, and enforcement that trademark owners should consider using as they navigate ever-changing cultural pressures and trends that can make their “good trademarks go bad”.

Organizing Committee: International Trademark Law

Speakers:

Makiko Coffland, Christensen O'Connor Johnson Kindness PLLC
Victoria Longshaw
Matt Owen, Caterpillar
Anthony Prenol, CPST Intellectual Property

Generative AI & Copyrights: Eligibility, Fair Use, and Liability

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Prof. Jessica Silbey, Boston University
Barry Sookman, McCarthy Tétrault

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Trademark & Copyright Sessions

Fair Use

Tuesday, September 12, 9:15-10:15am ET

Tik Tok, Twitter, Instagram, YouTube, Twitch, NFTs. . . . With the rapid growth and expansion of digital platforms allowing for content, logos, and products to be at everyone's fingertips, content development and creation is critical. An ever-increasing desire for content to fill these new social and virtual outlets inevitably means pushing the boundaries on the use of others' works, without permission. The panel will discuss how and if fair use under both copyright and trademark is being used or challenged to give consumers and companies the right to use the content of others that they so desperately need.

Organizing Committees: Copyright & Related Rights and US Trademark Law

Moderator: Sarah O'Grady, CPST Intellectual Property

Speakers:

Paul Mussell, Wells Fargo

Chris Ott, Capital One

Prof. Alfred C. Yen, Boston College Law School

Using the ITC and Section 337 to Protect Valuable Brands

Tuesday, September 12, 11:00–12:00pm ET

This session will examine how some of the world's most valuable corporations and brands in widely diverse industries and product types have used Section 337 investigations at the US International Trade Commission to protect their businesses and market share against competitors both large and small. Speakers will provide a basic overview of the ITC and Section 337 investigations, including both an explanation of the different types of claims that can be brought under the statute and the remedies Section 337 provides. They will discuss some notable instances or case studies of large companies/brands who have used the ITC and consider how these cases played out differently in the ITC than they might have in federal court.

Organizing Committee: US International Trade Commission

Speakers:

Christopher Renk, Arnold & Porter LLP

Kecia Reynolds, Paul Hastings LLP

Dan Valencia, DLA Piper LLP

Additional speaker to be announced





Trademark & Copyright Sessions

Trademark Issues Created by Emerging Tech

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Organizing Committees: US Trademark Law and International Trademark Law and Practice

Moderator: Jake Feldman, Kenvue

Speakers:

Pete Becker, Christensen, O'Connor, Johnson & Kindness
Jon Jekel, Pillsbury Winthrop Shaw Pittman, LLP
Kim Maynard, Frankfurt Kurnit Klein & Selz P.C.

Extraterritoriality Issues in Trademark Law

Tuesday, September 12, 2:45-3:45pm ET

This session will review recent cases that consider the extraterritorial reach of the Lanham Act. Specifically, speakers will discuss the *Abitron Austria v. Hetronic International* opinion by the US Supreme Court; the European Court of Justice ruling that found Amazon liable for infringing goods on its website; and the 2011 decision in *Lucasfilms v. Ainsworth* by the Supreme Court of the UK.

Organizing Committees: Anti-Counterfeiting & Anti-Piracy and US Trademark Law

Speakers:

Jered Matthyse, Pirkey Barber PLLC
Dennis Prah, Ladas & Parry
Mike Sweeney, Corsearch





Industrial Design Sessions

International Design: To Hague or Not To Hague?

Monday, September 11, 2:15-3:15pm ET

Seventy-nine countries have signed on to the Hague Agreement, enabling a global design filing strategy to take shape. China has been a signatory since last year, but some have expressed concerns about it being slow to examine and register a partial design. How does an individual country strategy affect whether to file under the Hague System? As practitioners gain experience with the system, speakers will discuss some key tips and strategies that have helped with deciding whether to file with the Hague system or not.

Organizing Committee: Industrial Designs

Moderator: Bart Fisher, Caterpillar

Speakers:

Gregoire Bisson, World Intellectual Property Organization
Tracy-Gene Durkin, Sterne, Kessler, Goldstein & Fox, PLLC
Sabine Kossak, Olbricht Patentanwälte

Design Law and Policy Updates

Monday, September 11, 4:00-5:00pm ET

The Right to Repair is on the books in 24 states (as of the end of Feb 2023). This session will address the similarities and differences between the laws as well as how to navigate between the different laws if you operate in multiple jurisdictions. Speakers will also provide an overview of what is on the near-term horizon.

Organizing Committee: Industrial Designs

Moderator: Dunstan Barnes, McAndrews, Held & Malloy, Ltd.

Speakers:

Kerith Kanaber, Dorsey & Whitney, LLP
Jann Moore, Caterpillar
Ryan Sandrock, Shook Hardy & Bacon LLP

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Industrial Design Sessions

Hot Precedential/Paradigm Shift: *GM v. LKQ*

Tuesday, September 12, 11:00am–12:00pm ET

LKQ challenged the definition of an ordinary observer and the proper test for obviousness in design law. Now the Federal Circuit has agreed to take up LKQ's petition for rehearing en banc and issued a series of detailed questions to be considered. This forthcoming decision could fundamentally change design patent obviousness. Speakers will discuss the current state of design patent obviousness law in light of the recent Federal Circuit opinions. They will also discuss how to implement a filing strategy to avoid the implications of this potential case law.

Organizing Committee: Industrial Designs

Moderator: Elizabeth Ferrill, Finnegan, Henderson, Farabow, Garrett & Dunner LLP

Speakers:

Perry Saidman, Saidman Design Law Group
Brendan O'Dea, Womble Bond Dickinson LLP

Protection of Design Rights in the Virtual World

Tuesday, September 12, 4:30–5:30pm ET

The designs used in the virtual world could already be protected in the real world or they could be created only for the purposes of the virtual world. Either way, protection and enforcement of these designs is a necessity. With many Asian countries being significant players in the creation of platforms for the virtual world, the issues related to protection and enforcement of IP rights in these countries becomes more relevant. Speakers will discuss whether the current laws are adequate to provide protection. They will also discuss some case studies as well as criteria for usage and protection of design rights in the virtual world.

Organizing Committees: Asian Practice, European Practice, Industrial Designs, and International Trademark Law & Practice

Moderator: Ashwani Balayan, ALG India Law Offices LLP

Speakers:

Mike Binns, Meta
Jeremy Kriegel, Marshall, Gerstein & Borun LLP
Ude Lu, Purplevine IP

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D&I, Mental Health, and Ethics

Increasing Lead Trial Counsel Diversity

Monday, September 11, 12:30–1:30pm ET

This session will provide background regarding the status of diversity, including racial and gender diversity, in lead trial counsel in IP litigation, and explore the value that increased diversity can provide. Speakers will discuss resources available to attorneys to help increase diversity among lead trial counsel and recommended action steps for judges, in-house counsel, and outside counsel.

Organizing Committees: LeadersHIP Development, Diversity & Inclusion, Patent Litigation & Remedies, and Women in IP Law

Speakers:

Brian Brookey, Tucker Ellis LLP
Sapna Palla, Allen & Overy, LLP
Kassie Helm, Dechert LLP
Nichole Valeyko, Merck & Co. Inc.

Mental Health in the Legal Profession

Tuesday, September 12, 1:00-2:00pm ET

Mental health problems are common in the legal profession. Research has shown that lawyers are prone to stress-related illnesses, including burnout, insomnia, clinical depression, gambling addiction, and substance abuse. Despite the evidence, there is little discussion or acknowledgement of the problem, even by those who have sought treatment. Many attorneys do not wish to disclose their illness to employers, clients, managers, and supervisors because it might jeopardize their credibility and reputation, as well as possibly making their firm or corporation liable for a poor work product. This session will provide tips and resources for legal professionals as well as their organizations to help gain awareness and provide support.

Organizing Committee: Women in IP Law

Moderator: Sandra Nowak, 3M Innovative Properties Co.

Speakers:

Andrew Currier, Perry + Currier Inc.
Shawn Healy, Lawyers Concerned for Lawyers, Inc.
Rachael Rodman, Ulmer & Berne, LLP

Legal Ethics: The 7 Cs of Legal Ethics

Monday, September 11, 4:00-5:00pm ET

Using the rubric of *The 7 Cs of Legal Ethics*, this session will provide an overview of both the Model Rules of Professional Conduct and the more common ethical dilemmas that practitioners confront. The speaker will touch upon client communication, tech competence, confidentiality, and conflicts of interest. Mike's job includes responding to ethics inquiries from lawyers.

Speaker: Michael Kennedy, Vermont Judiciary





Workshops

IPO is offering four interactive workshops this year. The first two will take place during lunch on Monday, September 11. The second two will take place during breakfast on Tuesday, September 12. Lunch and breakfast will be extended during these time slots so that there is time for attendees to enjoy their meal prior to attending the workshops. The IP Expo will remain open during the workshop hours for those who do not wish to attend a workshop.

Note: *Continuing Legal Education (CLE) credit will not be offered for the workshops.*

Using Key Performance Indicators (KPIs) to Leverage Your IP and Manage More Effectively

Monday, September 11, 1:00-2:00pm ET

IPO's Corporate IP Management and Operations Committee has been working on a Key Performance Indicator (KPI) Reference Guide for over a year. During this workshop, participants will be able to critique, refine, and expand different sections of the guide. Participants will learn how KPI's can be used to leverage their IP and conduct effective management. No prior knowledge of the guide is necessary to participate.

Organizing Committee: Corporate IP Management & Operations

Facilitators:

Peter Mattei, Tenneco Inc.
Jayne Piana, Fletcher Yoder
Brad Van Pelt, Banner & Witcoff, Ltd.
Carrie Webb Olson, Day Pitney LLP
Laura Zager, Thermo Fisher Scientific Inc.

Unraveling Titles, Credentials, and Capabilities to Promote Effective Practitioner Collaboration in Your Organization

Monday, September 11, 1:00-2:00pm ET

There are similarities and differences in the credentials held by different patent practitioners in the US and Europe. This workshop will focus on how to improve the partnership between patent attorneys and patent practitioners in your organization. Participants will discuss following questions:

- Do job titles imply credentials, responsibilities, and patent office representation capabilities in front of the USPTO and EPO?
- What tasks can practitioners perform in your organization?
- What are the future opportunities (if any) for harmonizing registration requirements across the patent offices in different jurisdictions? For example, should all patent practitioners have patent-related CLE and practical training requirements?

The workshop will include interactive tips and examples of how a broad bench with different types of practitioners (US attorneys/agents, EP attorneys/solicitors) can strengthen your organization, reduce costs, and increase efficiencies. Come with thoughts to share, and leave inspired by the possibilities.

Organizing Committee: European Practice and Patent Agents

Speakers:

Kate Helmich, Cargill, Incorporated
Jakob Kellenberger, Procter & Gamble Co.
Dan Staudt, Siemens Corp.





Workshops

Crossover Between Data and IP

Tuesday, September 12, 8:00-9:00am ET

This workshop will begin with a presentation by chief IP counsel and their data/privacy team lead discussing the need for collaboration to navigate the crossover between AI/data and IP. Participants will be able to ask questions and share their experiences on how their organizations are dealing with this rapidly growing need.

Speakers:

Kaveh Rashidi-Yazd and Joy Johns, Eaton Corporation
Karen Cochran and Daniel Schuch, Shell USA Inc.

Collaboration with Start-ups and SMEs

Tuesday, September 12, 8:00-9:00am ET

This workshop will begin with a presentation on why and how to work with start-ups and small and medium-sized enterprises (SMEs), including tips and watchouts.

Moderator: Ray Farrell, Carter, DeLuca, Farrell LLP

Speakers:

Matt Bryan, World Intellectual Property Organization
Jessica Ergmann, Broad Institute
Elizabeth Lester, Equifax
Jim Freedman, MIT Venture Mentoring Service Outreach Program



IP HUB PROGRAM

MONDAY, SEPTEMBER 11

Time	Presentation	Speaker
9:40-9:55am	Strategic Decision Making: Maximizing Success with an Integrated IP Management Solution This presentation explores the crucial role of strategic decision making within an integrated IP management solution. Attendees will gain insights into leveraging this solution to enhance intellectual property asset management, align with business objectives, and drive competitive advantage in a rapidly evolving landscape.	Vincent Brault Anaqua SVP of Product & Innovation
12:40-12:55pm	GenAI and the Future of Patent Development Prepare to redefine the very foundation of patent portfolio development as we unveil the unparalleled potential of GenAI—a game-changer that will revolutionize how in-house legal teams approach patent strategy and portfolio development. Until now, much of this responsibility has been anchored in traditional law firms. But as we stand on the brink of a technological renaissance, GenAI-powered legal technology can redefine our patenting trajectory. This is not just about adopting a new technology; it is about a fundamental change to empower in-house teams to achieve more and add new value while lowering costs. We need to recognize that the time is right for a solution that brings unmatched efficiency, cost-effectiveness, and precision. For major patent filers, the future beckons a world where technology and strategic acumen merge seamlessly. To harness this future, we must be ready to rethink our strategies, embrace the capabilities of GenAI, and commit to innovation at every step of our patenting journey.	Ian Schick, Ph.D., Esq. Ethan Nathaniel, Inc. Founder & Chairman
1:05pm-1:20pm	JPO as your Business Partner As an international innovation hub, JPO offers fast and reliable patent examination with competitive fees. Discover Japan's significance for global innovators and learn about the advantages of filing patent applications through JPO!	Atsushi Hiruta Japan Patent Office (JPO) Chief Director IP Division IP Attaché of Japan Patent Office
1:30pm-1:45pm	Recent Updates on Startups' IP Activities in Japan We will show startups' patent application statistics and useful information on the specialized examination for startups and SMEs.	Yukihuro Takemoto JPAA Member JPAA International Activities Center
3:20-3:35pm	Streamlining foreign filing processes by adopting technologies that make the difference <ul style="list-style-type: none">• Is centralization a must for large filers?• How software can change your business• Getting real for corporations (Top Pharma Case Study)	José Figueroa SHIP Global IP Managing Director, Americas

TUESDAY, SEPTEMBER 12

Time	Presentation	Speaker
10:20-10:35am	Unlocking Global Patent Value: Smart Strategies for Building a Strong Portfolio within Budget Constraints. Amid the pandemic's economic fallout, patent budgets tightened, prompting applicants to cut costs by scaling back on original and foreign filings. This downsizing directly impacts the global portfolio's value. Our innovative and unique solutions at Questel offer two data-driven strategies to trim expenses elsewhere, allowing clients to safeguard their portfolio's value by redirecting funds towards crucial original and foreign filings while staying within budget.	Eric Satermo Questel Subject Matter Expert – Filing & Prosecution Services
10:40-10:55am	Check the IPO Meeting App for more information on this presentation	Presentation by IP Rally



Networking Events

Networking events are an important part of what makes the IPO Annual Meeting so special. By participating in the following networking events, you will create new connections and build relationships that last.

Networking Social Event

hosted by the Women in IP Law Committee

Sunday, September 10, 1:00pm-2:00pm ET

Join IPO's Women in IP Committee for a networking event and to learn more about the work of the committee. Open to all registered attendees. Advance registration is required. Space is limited.

Sponsored in part by: Dennemeyer

Welcome Reception

Sunday, September 10, 6:00pm-8:00pm ET

Renew acquaintances and make new friends by attending the Welcome Reception immediately following the opening session. Open to all registered attendees.

Sponsored by: Ropes & Gray LLP

Fun Run/Walk

Monday, September 11, 6:30-7:30am ET

Join colleagues for a guided 5K fun run or 3K around the Back Bay neighborhood in Boston. All skill levels welcome. This is not a race. IPO will provide a grab-and-go breakfast. Advance registration required. Space is limited.

Sponsored by: Banner & Witcoff, Ltd.

IP Expo Hall

Monday-Tuesday, September 11-12

The IP Expo Hall is your go-to destination to discover innovative solutions to your needs. Breakfast, coffee breaks, and lunches will be served in the IP Expo Hall on Monday and Tuesday.

IP Hub

Monday-Tuesday, September 11-12

The IP Hub, located in the IP Expo Hall, will feature short presentations during breaks for attendees to learn more about products and resources. Presentations will be listed in the program.

Breakfast & Breaks

Monday-Tuesday, September 11-12

Breakfast and coffee breaks will be held in the IP Expo during the meeting. The IP Expo is open to all registered attendees to greet one another, exchange ideas, relax, and grab food and drinks.

Monday Breakfast and Breaks Sponsored by:

Leydig, Voit & Mayer, Ltd.

Lunches

Monday-Tuesday, September 11-12

Lunch will be served a la carte in the IP Expo Hall. Attendees can join colleagues to network and exchange ideas or grab lunch and head to their room for a quick conference call. Lunch is open to all registered attendees.

Networking Social Event

hosted by the Diversity & Inclusion Committee and Resource Groups

Monday, September 11, 5:30pm-6:30pm ET

Join IPO's Diversity & Inclusion Committee and its Resource Groups (Asian IP Professionals, Black IP Professionals, Hispanic IP Professionals, IP Professionals with Disabilities and Advocates, and Pride & Allies IP Professionals) for a networking event and to learn more about the work of the committee. Open to all registered attendees. Advance registration is required. Space is limited.

Sponsored in part by: Osha Bergman Watanabe & Burton LLP

Dinner Reception at the Museum of Science

Monday, September 11, 7:00pm-9:30pm ET

Annual Meeting attendees are invited to attend a dinner reception at the Museum of Science. Attendees will be able to network with peers, scroll through many exhibits, and grab food and drinks.

Transportation between the Sheraton Hotel and the Museum of Science will be provided. Buses will begin departing the Sheraton at 6:30pm ET. The last bus will return to the JW Marriott by 10:00pm ET.

Sponsored by: Finnegan, Henderson, Farabow, Garrett & Dunner, LLP;

2023 ANNUAL MEETING

BOSTON, MA



The Chartered Institute of
Patent Attorneys invites you
to...



Drinks Reception

6pm, Tuesday 12th September
Public Garden,
Sheraton Boston Hotel

[Book your place here!](#)



CIPA

THE CHARTERED
INSTITUTE OF
PATENT ATTORNEYS



Registration Form

Name _____ Title (i.e., Partner, VP) _____

Organization _____

Address _____

City _____ State _____ ZIP _____ Country _____

Phone _____ Email _____

List each of the states you're requesting CLE credit for _____

Fees

Enter applicable rate and fees in the column at right and total below.

1. Annual Meeting Registrant

APPLICABLE RATE:

		Per person
IPO Member (after Sept. 8, 2023)	\$1,300	\$ _____
Non-Member (after Sept. 8, 2023)	\$2,500	\$ _____
Gov/Academic/Emeritus	\$650	\$ _____
IPO Member Group Rate*	\$750	\$ _____
Guest Pass	\$250/person	\$ _____
Guest(s) Name(s) _____		

2. I have read and agree to IPO's Meeting Policies.

TOTAL AMOUNT DUE: \$ _____

3. Check all events you wish to attend

- Fun Run/Walk KPI Workshop Patent Agent Workshop Start-up/SME Workshop
- Crossover Between Data and IP Workshop Networking Event Hosted by Women in IP Law Committee
- Networking Event Hosted by Diversity & Inclusion Committee

Method of Payment

Wire (contact meetings@ipo.org for wire information)

Credit Card (Registrations sent by fax or email MUST include credit card account information)

American Express MasterCard Visa Discover

Card # _____ Exp. Date _____ Security Code _____

Cardholder Name (print) _____ Date _____

Signature _____

Registration fees include: All education sessions; CLE Credit to applicable states; networking luncheons, breakfasts, and breaks on Monday and Tuesday (Sept. 10-12); Sunday Welcome Reception; Monday Evening Reception, and access to the IP Expo Hall. **IPO does not provide a refund if an attendee chooses not to participate in any of the functions included with their registration fees.**

***IPO Member Group Discount:** Any IPO member organization that pays for five or more employees to attend the annual meeting will receive a rate of \$750 per registrant. *No other discounts apply.*

Return form to meetings@ipo.org

Payment must be received with a completed registration form. Forms received with payment will be processed within one business day. Once payment is processed, a confirmation email will be sent to the email provided above. Refer to the [IPO Annual Meeting website](#) for meeting and cancellation policies. By submitting this form, you agree that you have read IPO's meeting and cancellation policies as noted on our website.

Questions? Visit ipo.org or call +1 202-507-4500.

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