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ARTIFICIAL INTELLIGENCE

2026 IPO ANNUAL MEETING

September 27-29, 2026

Sheraton Centre Toronto Hotel

Featured Speakers



**Konstantinos
Georgaras**
Chief Executive Officer,
Canadian Intellectual
Property Office



John Squires
Under Secretary of
Commerce for Intellectual
Property and Director
of the U.S. 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/am2026



Program at a Glance

Time (ET)	Sunday, Sept. 27	Monday, Sept. 28	Tuesday, Sept. 29
6:15 a.m.		IPO Fun Run/Walk (breakfast provided)	
7:00 a.m.		Breakfast & IP Expo	
7:30 a.m.			Chief IP Counsel Breakfast (by invitation only)
8:00 a.m.		Welcome & Keynote by John Squires, Director of the U.S. Patent & Trademark Office	Breakfast & IP Expo
8:30 a.m.			
9:00 a.m.			
9:15 a.m.			
9:30 a.m.			
10:00 a.m.		Concurrent Sessions – AI Search & Analysis – U.S. Design Law Update	Concurrent Sessions – Leveraging Letters of Consent & Coexistence Agreements for Trademark Portfolios – Termination Rights Post-Vetter – Reexamination Resurgence
10:15 a.m.			
10:30 a.m.			Coffee Break/IP Expo/IP Hub
11:00 a.m.		Coffee Break/IP Expo/IP Hub	Concurrent Sessions – Protecting the Integrity of the Federal Trademark Register – Protecting Software IP in the AI Era – Global Injunction Playbook
11:15 a.m.			
11:30 a.m.		Concurrent Sessions – Inducement & Indirect Infringement – The Real Impact of Office AI Tools on Trademark Prosecution – AI, Trade Policy, and IP	
12:00 p.m.	IPO Board of Directors Meeting (Board Members and Alternates Only)		
12:15 p.m.		Lunch, IP Expo, & IP Hub	Lunch & IP Expo
12:30 p.m.			Workshops – Know Thyself: Why Self-Awareness May Be the Most Important Skill – How In-House IP Departments are Deploying AI
1:00 p.m.			
1:30 p.m.			
1:45 p.m.			
2:00 p.m.	IPO Connect: Committee Open Houses	Welcome Lounge Featuring IPO's Diversity, Equity & Inclusion Committee Resource Groups and IPO's Wellness Committee	Concurrent Sessions – Worldwide Design Law Updates – Effective Online Brand Protection in the AI Era – IP Risks & Strategic Considerations When Using AI to Generate Software Code
2:15 p.m.			
2:30 p.m.			
3:00 p.m.			Coffee Break & IP Expo
3:15 p.m.			
3:30 p.m.	IPO Connect: Committee Open Houses	Coffee Break/IP Expo/IP Hub Harmonization Committee Meeting (by invitation only)	Concurrent Sessions – Unconventional Trademarks, Trade Dress, Design Patents & Industrial Designs – Joint Licensing Models – Global Enablement & Disclosure Strategies for AI-Related Patent Apps
4:00 p.m.			
4:15 p.m.		Concurrent Sessions – Global Border Enforcement Trends – Copyright Licensing Playbook – Options for Fast-Track Litigation Around the World	
4:30 p.m.	Welcome & Fireside Chat with Konstantinos Georgaras, CEO of Canadian Intellectual Property Office		Ethics in the Age of AI
5:00 p.m.			
5:30 p.m.			
6:00 p.m.			
6:30 p.m.			
7:00 p.m.	IPO Board of Directors & Special Guests Dinner (by invitation only)	Welcome Reception	
7:30 p.m.			
8:00 p.m.		Dinner Reception at Steam Whistle Brewing	Reception hosted by CIPA
8:30 p.m.			
9:00 p.m.			
9:30 p.m.			





Program

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Sunday, September 27

<u>TIME</u>	<u>FUNCTION</u>
11:00AM 2:00PM	IPO Board of Directors Meeting <i>board members and alternates only</i>
1:00PM 6:00PM	Registration and Name Badge Pick-up
1:00PM 4:00PM	Welcome Lounge featuring IPO's Diversity, Equity, and Inclusion Committee and Resource Groups, Wellness Committee, and Patent Agent Committee
1:00PM 4:15PM	IPO Connect: Committee Open Houses (Open to all registrants) <u>1:00PM-3:00PM:</u> Asian Practice (<i>Guest Speaker: Mr. MATSUSHITA Koichi, JPO</i>) <u>2:00PM-3:00PM:</u> Anti-Counterfeiting & Anti-Piracy Canadian Practice Corporate IP Management & Operations International Patent Law & Trade (<i>Guest Speaker: Hanna Kang, WIPO</i>) Patent Agents Pharmaceutical & Biotechnology Issues U.S. Patent Law (<i>Guest Speaker: Marla Grossman, ACG Advocacy</i>) U.S. Patent Litigation U.S. Trademark Office Practice Wellness (<i>Featuring Chair Yoga led by Lynn, Santé Active Studio</i>) <u>3:15PM-4:15PM:</u> AI, Data & New Emerging Technologies and Software Related Inventions (<i>Guest Speaker: David Kappos, Cravath, Swaine & Moore LLP</i>) Copyright & Related Rights Diversity, Equity & Inclusion European Practice Industrial Designs (<i>Guest Speaker: Grégoire Bisson, WIPO (invited)</i>) International Trademark Law & Practice (<i>Guest Speaker: Quan Sim, WIPO (invited)</i>) IP Licensing & Related Issues Latin American Practice Leadership Development Patent Search Trade Secrets U.S. Patent Office Practice U.S. Post-Grant Patent Office Practice U.S. Trademark Law & Litigation Women in IP
4:30PM 5:30PM	Welcome & Fireside Chat with Konstantinos Georgaras, CEO, Canadian Intellectual Property Office  Konstantinos Georgaras is the Chief Executive Officer at the Canadian Intellectual Property Office (CIPO), where he provides strategic direction and leadership and ensures the provision of world-class intellectual property services by granting IP rights and providing IP awareness and information. Mr. Georgaras has extensive experience spanning strategic, economic and legislative policy, with direct responsibilities for IP, innovation, insolvency and industrial and labor market policies. Mr. Georgaras holds a Master of Arts in Public Administration from Carleton University and an Executive Certificate in Public Leadership from the John F. Kennedy School of Government at Harvard University.
5:30PM 6:00PM	Patent and Trademark Case Law Update <u>Speakers:</u> Paul Berghoff , McDonnell Boehnen Hulbert & Berghoff LLP Laura Sheridan , Google LLC
6:00PM 8:00PM	Welcome Reception <i>Sponsored by Li & N IP</i>
7:00PM 8:30PM	IPO Board of Directors and Special Guests Dinner <i>Sponsored by Torys LLP</i>





Program

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Monday, September 28

<u>TIME</u>	<u>FUNCTION</u>
6:15AM 7:30AM	IPO Fun Run/Walk <i>Sponsored by Banner Witcoff</i> <i>Grab and go breakfast will be provided; Location: Sheraton Centre Toronto Hotel</i>
7:30AM 5:00PM	Registration, Name Badge Pick-up, & CLE Sign-in
7:30AM 8:30AM	Breakfast & IP Expo <i>Breakfast sponsored by Leydig, Voit & Mayer, Ltd.</i>
8:30AM 9:20AM	Welcome, IPO Awards & Keynote Address by Director John Squires, U.S. Patent and Trademark Office  John A. Squires is the Under Secretary of Commerce for Intellectual Property and Director of the U.S. Patent and Trademark Office. He is also the principal IP advisor to the President and Administration, through the Secretary of Commerce. He has extensive experience in all aspects of IP and emerging companies, across a vast array of scientific and technology disciplines, including patent and trademark asset creation, procurement and acquisition, transactions, licensing, corporate formation, governance and structuring, litigation and regulatory, and risk management matters. Mr. Squires received his B.S. in Chemistry from Bucknell University and his J.D. from the University of Pittsburgh School of Law.
9:30AM 10:30AM	Concurrent Sessions There's More to Searching Than Finding: AI-Assisted Analysis in Practice <i>Organizing Committees: AI, Data & New Emerging Technologies; U.S. Trademark Office Practice; and Patent Search</i> This session will review AI search tool capabilities across a range of IP disciplines, including the tools that are employed by the USPTO, and will explore how those tools are reaching beyond the identification of references to include analysis. Speakers will discuss expectations for AI-assisted analysis and how to frame effective prompts for AI tools, and address the advantages and limitations of AI's influence on review and analysis workflows. <u>Speakers:</u> Natalie Keane , Cardinal IP Edward Ryan Jonathan Skovholt , Ensemble IP Martha Yates , Bayer Intellectual Property GmbH U.S. Design Law Updates: Caselaw, GUI's and Virtual Designs <i>Organizing Committee: Industrial Designs</i> This session will review recent U.S. design law developments. Topics include the USPTO's guidance on protection of GUI's and virtual designs issued this spring; <i>LKQ v. GM</i> ; Schedule A cases; and Range of Motion. Speakers will review how these decisions are being implemented at the USPTO and in the courts and offer guidance for next steps. <u>Speakers:</u> Elizabeth Ferrill , Finnegan, Henderson, Farabow, Garrett & Dunner, LLP Daniel Gajewski , Sterne, Kessler, Goldstein & Fox PLLC Charles Kim , Jones Day (invited)





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<u>TIME</u>	<u>FUNCTION</u>
10:30AM 11:15AM	Break, IP Expo, & IP Hub <i>Break sponsored by Leydig, Voit & Mayer, Ltd.</i>
10:35AM 10:50AM	IP Hub Presentation: AI for Patent Practice – What Every Firm Should Look For This presentation will provide best practices and tips on selecting, implementing, and maximizing AI in patent practice. Drawing on real-world experience, this talk will cover what works, what to avoid, and key considerations when evaluating these tools. <u>Speaker:</u> Harm van der Heijden , Ankar AI
10:55AM 11:10AM	IP Hub Presentation: Securing Innovations – Korea’s Strong IP Enforcement Discover Korea's recent transition to the high-level Ministry of Intellectual Property (MOIP, formerly KIPO) along with covering the massive expansion of the Special Judicial Police targeting patents, trademarks, and trade secret infringement using big data. Also, learn about Korea's innovative patent system and the advantages of filing in Korea. <u>Speakers:</u> Manyeol Han , Embassy of the Republic of Korea in the USA and Hyunkyung Lee , PCT Korea
11:15AM 12:15PM	Concurrent Sessions Inducement & Indirect Infringement: Navigating Launch Risk Across Industries <i>Organizing Committees: Pharmaceutical & Biotechnology Issues; Asian Practice; European Practice; and Canadian Practice</i> This session will explore how inducement and contributory infringement are interpreted across key jurisdictions. Beginning with the U.S. Supreme Court’s recent decision in <i>Hikma Pharmaceuticals USA Inc. v. Amarin Pharma, Inc.</i> on inducement in the context of pharmaceutical skinny labeling, the panel will broaden to cover cross-industry scenarios, examine how courts look beyond the product label to assess companies’ actual market conduct, intent, and how products are ultimately used. <u>Speakers:</u> Frederick Ch’en , Hogan Lovells Vidisha Garg , Anand and Anand Advocates Daniela Gill-Carey , Astellas Pharma Europe Ltd J.C. Rozendaal , Sterne, Kessler, Goldstein & Fox, PLLC Andrew Shaughnessy , Torys LLP The Real Impact of Office AI Tools on Trademark Prosecution Around the World <i>Organizing Committees: International Trademark Law & Practice and AI, Data & New Emerging Technologies</i> This session will examine whether and to what extent AI tools adopted by IP offices are affecting prosecution success rates and reducing processing times for trademark applications. AI tools now in active use at leading offices include the USPTO (Class ACT), IP Australia (TM Checker and Smart Assessment Toolkit), and the EUIPO. Speakers will discuss real-world results from early-adopter jurisdictions, lessons learned from implementation, governance and accuracy challenges, and strategic implications for brand owners filing global trademark portfolios. <u>Moderator:</u> Juliana Hoffmann , Daniel Law <u>Speakers:</u> Quan Sim , World Intellectual Property Organization (invited) Dan Vavonese , U.S. Patent & Trademark Office Additional speaker to be announced





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<u>TIME</u>	<u>FUNCTION</u>
11:15AM 12:15PM	Concurrent Sessions (continued) AI, Trade Policy, and IP: Navigating the U.S.-China Landscape This session will examine the rapidly evolving intersection of AI, trade, and IP in the U.S. and China. As AI becomes a strategic priority in both jurisdictions, shifting regulatory frameworks, trade policies, and innovation ecosystems are reshaping how IP is developed, protected, and commercialized. Gain insights into key differences and emerging convergence between U.S. and Chinese approaches to AI-related IP, including patenting trends, data governance, and technology transfer considerations. The session will also explore how geopolitical dynamics, export controls, and cross-border collaboration impact IP strategy and risk management for global organizations. <u>Moderator:</u> Tom Stoll, Genentech <u>Speakers:</u> David Kappos, Cravath, Swaine & Moore LLP Troy Prince, RTX Corporation Additional speaker to be announced
12:15PM 2:15PM	Lunch, IP Expo, & IP Hub <i>Lunch will be provided in the IP Expo Hall during this time frame. There are several activities for attendees to choose from (listed below). Space is limited. Attendees may also use this extended time to network or catch up on work.</i>
1:00PM 1:15PM	IP Hub Presentation: IP Trivia Showdown - Fast Answers. Big Prize. Surprising IP Facts. How much do you really know about IP? Join us for a fast-paced trivia competition featuring categories such as IP History & Famous Inventors, Famous Brands & Trademarks, Canadian Innovation, and Weird but True IP Facts. Put your IP knowledge to the test against fellow attendees as you compete for a spot at the top of the live leaderboard. Bring your competitive spirit and see if you have what it takes to claim the top spot (and a prize valued at up to \$100). <u>Host:</u> Mark Bullar, Anaqua
1:20PM 1:35PM	IP Hub Presentation: Inside an AI-Enabled FTO Workflow Go beyond AI promises and into a practice-focused workflow that's reducing FTO analysis time by more than 50%. The presentation will break down a three-stage architecture for AI-driven FTO analysis: automated triage that reviews each claim of a patent set against a product description in text and images, open-question resolution that extracts for analyst response the critical decisions blocking each unresolved call, and agent-assisted deep dive analysis for the hardest, most judgment-intensive cases. At every stage, AI produces a structured, reviewable record that, with analyst review and confirmation, becomes the defensible system of record for freedom to operate. <u>Speaker:</u> Gabe Sukman, ClearstoneIP
1:40PM 1:55PM	IP Hub Presentation: From Patent Signals to Decision-Ready Monetization Opportunities Large patent portfolios rarely suffer from a lack of data; the real challenge is determining which signals represent credible commercial opportunities. This presentation will provide a practical framework for identifying and qualifying potential licensing, technology-adoption, and enforcement opportunities. It will explain how prosecution, portfolio, technical, product, and market signals can be validated through claim analysis, public product evidence, ownership and legal-status review, validity and post-grant screening, and commercial assessment. Using anonymized examples, the presentation will demonstrate how candidates can be advanced, further validated, redirected toward licensing, held, or stopped before significant corporate or counsel resources are committed. <u>Speaker:</u> Bhasker Sharma, PatentsKart





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<u>TIME</u>	<u>FUNCTION</u>
1:00PM 2:00PM	Concurrent Workshops: In-House IP Leadership & Influence Development Toolkit <i>Organizing Committees: Leadership Development and Corporate IP Management & Operations</i> This workshop will introduce a new resource designed for in-house IP professionals navigating leadership challenges. The toolkit is organized in a “Choose Your Own Adventure” style format, allowing users to engage with it based on scenarios that align best with their needs. Attendees will help shape the final format of the toolkit through facilitated small-group discussions and leave with resources and ideas to support their own leadership development. Specific focus areas include change management, emotional intelligence and self-management, feedback, core leadership skills, organizational intelligence, and career development. <u>Facilitators:</u> Andrea Evensen, Solventum Susi Fish, Boulton Wade Tennant LLP Heather Hedeon, Microsoft Corporation Rory Pheiffer, Barnes & Thornburg LLP Meredith Struby, Meunier Carlin & Curfman LLC Inventor Rewards and Recognition Survey: Results Panel <i>Organizing Committees: Corporate IP Management & Operations; European Practice; and Asian Practice</i> This workshop will present key findings from IPO’s recent survey on inventor rewards and recognition programs. The session will highlight emerging trends, benchmarking insights, and practical considerations for designing and evolving effective recognition programs across global organizations. Attendees will engage in small-group discussions to exchange perspectives, share experiences, and explore best practices. <u>Facilitators:</u> Lisa Fulton, Solventum Carey Jordan, Vorys Toby Mak, Tee & Howe Intellectual Property Attorneys Peter Mattei, Tenneco Lars Nilsson, Tenneco
2:15PM 3:15PM	Concurrent Sessions Agentic AI for Patent Prosecution: From Coding Agents to Portfolio-Scale Patent Workflows <i>Organizing Committees: AI, Data & New Emerging Technologies; U.S. Patent Office Practice; and Patent Agents</i> Recent advances in coding agents are moving AI beyond chat into structured, tool-driven workflows. This session will introduce a model-agnostic framework for applying these methods to patent prosecution, with examples such as portfolio analysis, prosecution triage, claim-support review, and claim charting. Panelists will explore how these workflows can produce reviewable work products while preserving professional judgment, address potential inventorship issues, and conclude with key governance considerations including confidentiality, candor, supervision, auditability, and human review checkpoints. <u>Moderator:</u> Tom Wong, Microsoft Corp. <u>Speakers:</u> Kate Helmich, Cargill Incorporated Shankar Krithivasan, Qualcomm Incorporated Noah Tilton, Marshall Gerstein & Borun LLP





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<u>TIME</u>	<u>FUNCTION</u>
2:15PM 3:15PM	Concurrent Sessions (continued) Global Update on Colour Marks in Trademark Law <i>Organizing Committee: International Trademark Law and Practice</i> This session will provide an overview of recent judicial, legislative, and administrative developments in colour mark protection across key markets. Single colours and colour combinations remain powerful yet challenging forms of non-traditional trademark protection. Speakers will discuss registration standards, enforcement realities, and evolving strategic considerations. <u>Moderator:</u> Victoria Longshaw, Houlihan Intellectual Property <u>Speakers:</u> Laurie Bray, Withers & Rogers LLP Makiko Coffland, Christensen O'Connor Johnson Kindness PLLC James Lau, East IP Rob Milligan, Bird & Bird, LLP Training Data, Trade Secrets, and Transparency: Protecting Competitive Advantage in the AI Era <i>Organizing Committees: AI, Data & New Emerging Technologies; Trade Secrets; and Pharma & Biotechnology Issues</i> This session will explore the intersection of trade secret law, privacy regimes, and emerging AI transparency mandates. Learn how companies can protect proprietary AI models, training datasets, and related know-how as trade secrets while meeting disclosure, audit, and explainability obligations. Speakers will also discuss valuing AI-related trade secrets, managing bias and algorithmic accountability requirements, maintaining control over data processors, and negotiating representations and warranties on data quality and provenance in certain technology areas. <u>Moderator:</u> Shruti Costales, Shruti Law PLLC <u>Speakers:</u> Gunjan Agarwal, Eaton Corporation Avery Blank, Qualcomm Incorporated Jamie Davis, Bayer Intellectual Property GmbH Elizabeth Lester, Equifax
3:15PM 4:00PM	Break, IP Expo, & IP Hub <i>Break sponsored by Leydig, Voit & Mayer, Ltd.</i>
3:20PM 3:35PM	IP Hub Presentation: JPO as a Global Partner - Advancing Value for International IP Stakeholders Japan has built one of the most well-structured and reliable IP frameworks. This presentation will highlight the latest developments at the JPO, including flexible, user-driven initiatives designed to support global stakeholders. <u>Speaker:</u> Akiko Kakubari, IP Attaché of the JPO
3:40PM 3:55PM	IP Hub Presentation: Foreign-Language Patent Applications in Japan Japan's foreign-language filing system offers a unique advantage: applicants may rely on the originally filed foreign-language specification when determining the permissible scope of amendments, rather than being limited to the initial Japanese translation. This presentation will explain how to leverage this feature through effective filing and translation strategies, common pitfalls to avoid, and practical lessons from prosecution experience. Attendees will gain actionable insights for improving the efficiency, flexibility, and cost-effectiveness of patent prosecution in Japan. <u>Speaker:</u> Takahiro Yamazaki, JPAA





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<u>TIME</u>	<u>FUNCTION</u>
3:15PM 4:00PM	Harmonization Committee Meeting <i>By invitation only</i>
4:00PM 5:00PM	Concurrent Sessions Battles at the Border: Counterfeits, Designs, and Customs Enforcement in Canada, Asia, and the U.S. Organizing Committees: Canadian Practice, Anti-Counterfeiting & Anti-Piracy, Asian Practice, and Industrial Designs From knockoff pharmaceuticals to infringing fashion goods, border officials in Canada, Asia, and the U.S. face a steady influx of rights-infringing goods. That said, not all rights are protected everywhere. This session will explore the practical and legal dimensions of border enforcement in Canada, Asia, and the U.S., including what has, and has not, worked and differences in the scope of protection. The panel will provide key insights into best practices for rights-holders, as well as provide unique insight into local practices that might be adopted elsewhere. <u>Moderator:</u> Monica Riva Talley , Sterne, Kessler, Goldstein & Fox, PLLC <u>Speakers:</u> Karen MacDonald , Cassels Brock & Blackwell LLP Sanjiv Sarwate , Dell Technologies Nathan Yang , NTD Patent & Trademark Agency Ltd Life in the Fast Lane: Options for Fast-Track Litigation Around the World <i>Organizing Committees: European Practice; U.S. Patent Litigation; U.S. ITC; Asian Practice; and Latin American Practice</i> This session will compare fast-track IP enforcement options across key jurisdictions. In Europe, the UPC has maintained a high-speed timeline with first-instance infringement and revocation actions concluding within 12-14 months. The U.S. ITC can reach final decisions in 12-16 months. China's administrative enforcement can be particularly fast, and Brazil is developing fast-paced practice in preliminary injunction handling for SEP cases. Speakers will discuss strategic considerations and the advantages and drawbacks of pursuing rapid relief. <u>Moderator:</u> Tom Turner , Abel & Imray LLP <u>Speakers:</u> Judy K. He , Crowell Moring, LLP Yingyan Li , Li & N Intellectual Property Agency LTD Ricardo Dutra Nuñez , Lefosse Rhonda Schmidtlein , Wilmer Cutler Pickering Hale and Dorr, LLP Copyright Licensing Playbook: Strategies for Responding to Infringement Claims, Blanket Licensing Pitches, and Everything In Between <i>Organizing Committees: Copyright and Related Rights and U.S. Trademark Law & Litigation</i> Companies increasingly find themselves on the receiving end of a confusing array of outreach from copyright owners and their agents, ranging from threatening to chummy to misleading. Claims and licensing offers cover a broad scope of works, with some of the most frequent players involving font software, motion pictures, periodicals, photographs, and music clips. This session will provide an overview of the rights at issue and discuss strategies for avoiding infringement, responding to claims and sales pitches, and negotiating tailored settlement or license agreements to minimize the risk of recurring issues. <u>Speakers:</u> Jenevieve Maerker , Finnegan, Henderson, Farabow, Garrett & Dunner, LLP Kimberly Maynard , Frankfurt Kurnit Klein & Selz P.C. Danielle Olivotto , Qualcomm Incorporated





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Monday, September 28

TIME

FUNCTION

6:30PM
9:30PM

Special Event: Taste of Canada at Steam Whistle Brewery
Annual Meeting attendees are invited to attend a dinner reception at Steam Whistle Brewing, nestled in the heart of downtown Toronto. Guests will enjoy stunning views of the CN Tower and Rodgers Centre, home of the Toronto Blue Jays. The evening will showcase Canadian culture, with a menu inspired by regional flavors. Savor food and beverages while networking with peers in this uniquely Canadian setting.

Sponsored by Smart & Biggar LP



Tuesday, September 29

TIME

FUNCTION

7:30AM
9:00AM

Chief IP Counsel Breakfast
By invitation only
Guest Speaker: **Kevin Rhodes**, Executive Vice President and Chief Legal Affairs Officer and Secretary, 3M

8:00AM
9:15AM

Breakfast & IP Expo

8:00AM
5:00PM

Registration, Name Badge Pick-up, & CLE Sign-in

9:15AM
10:15AM

Concurrent Sessions

Reexamination Resurgence: What Every Patent Practitioner Needs to Know
Organizing Committees: U.S. Post-Grant Patent Office Practice and U.S. Patent Office Practice
As the grant rates for IPRs and PGRs have declined, third-party reexamination filings have surged, with *ex parte* reexamination requests reaching a record high in 2025. At the same time, leadership changes and new procedural guidance at the USPTO are reshaping reexamination practice. This session will provide practical, up-to-date guidance needed to navigate this rapidly evolving area.

Moderator: **Paul Vogel**, Shook, Hardy & Bacon LLP

Speakers:

Atanu Das, Guntin & Gust
Lynne H. Browne, Greenblum & Bernstein, P.L.C.
Lissi Mojica, AnswersIP
James (Hunter) Yancey, Jr., Qualcomm Incorporated





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Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
9:15AM 10:15AM	Concurrent Sessions (continued) Leveraging Letters of Consent & Coexistence Agreements for Trademark Portfolios <i>Organizing Committee: International Trademark Law & Practice</i> This session will examine the use of consent and coexistence agreements in trademark prosecution in key global markets. It will cover what makes these tools effective, the pros and cons of conditional consent, recent developments and various office practices, drafting strategies to maximize acceptance, and potential later consequences for future trademark registrations and enforcement. <u>Moderator:</u> Matthew Owen, Tenneco LLC <u>Speakers:</u> Kelsey Coplan, Christensen O'Connor Johnson Kindness PLLC Jay Chen, ESSEN Patent and Trademark Office Kathleen Lemieux, Borden Ladner Gervais, LLP Yoko Natsume, Ochi International IP Termination Rights Post-Vetter: Cross-Border Implications of the Fifth Circuit's Decision in Vetter v. Resnik <i>Organizing Committee: Copyright and Related Rights</i> This session will examine the implications of <i>Vetter v. Resnik</i>, which held that where an author's rights arise under U.S. domestic law, termination of a copyright transfer or grant terminates rights worldwide, not just in the U.S. This holding could give individual authors and heirs a significantly more powerful tool for recapitalizing on the value of overseas exploitation of their works. Speakers will discuss potential implications and considerations moving forward. <u>Moderator:</u> Jason Raff, Gray Ice Higdon, PLLC <u>Speakers:</u> Erica Carter, Carter Advisory, PLLC Casey Chisick, Cassels Brock & Blackwell, LLP Glenn Pudelka, Troutman Pepper Locke
10:15AM 11:00AM	Break, IP Expo, & IP Hub
10:20AM 10:35AM	IP Hub Presentation: Model Context Protocol – Connecting AI to Verifiable IP and R&D Data As AI becomes more connected to real-world data, the key question is shifting from whether an AI answer can be trusted to whether the AI has access to authoritative sources. This presentation will introduce the Model Context Protocol (MCP), explain its relevance to IP workflows such as prior art review, competitive monitoring, and portfolio management, and highlight key data quality, security, and governance considerations to raise prior to connecting AI systems to IP workflows. <u>Speaker:</u> Carl Rost, Patsnap
10:40AM 10:55AM	IP Hub Presentation: How AI is Redefining Corporate IP Departments AI is transforming corporate IP departments beyond simple automation. Rising volumes of AI-assisted invention disclosures, demands for faster filing decisions, and growing use of AI for portfolio management are reshaping IP operations. This session will explore emerging governance and operating models, key implementation challenges, and practical lessons for building effective AI-enabled IP functions. <u>Speaker:</u> Anant Kataria, Elevate





Program

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Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
11:00AM 12:00PM	Concurrent Sessions Protecting the Integrity of the Federal Trademark Register: The USPTO's Evolving Tools, Rules, and Enforcement Strategies <i>Organizing Committee: U.S. Trademark Office Practice</i> This session will review recent USPTO enforcement developments and rule changes. It will provide practical insight into compliance and risk management. Topics include USPTO fraud crackdown and register cleanup; expanded audit program using pixel-analysis software to flag digitally altered specimens; full retirement of TEAS and launch of Trademark Center with new fee structure; Madrid Protocol modernization proposals; and Trademark Modernization Act expungement/reexamination proceedings being used at scale. <u>Speakers:</u> Deirdre Clarke, Novartis Matt Homyk, Blank Rome LLP Sara Suleiman, HP Inc. Dan Vavonese, U.S. Patent & Trademark Office Protecting Software IP in the AI Era <i>Organizing Committees: Trade Secrets; U.S. Patent Law; Copyright & Related Rights; Software & Related Inventions</i> This session will examine the evolving landscape of software IP protection across multiple IP regimes as software becomes more critical across technologies. It will cover copyright protection for software and AI-generated code, inventorship considerations for AI-generated code, challenges and opportunities of trade secret protection as an alternative, post-Alice patent protection, and practical strategies and best practices for safeguarding innovation. <u>Moderator:</u> Moriah Bisewski, Fletcher Yoder <u>Speakers:</u> Jill Abasto, Qualcomm Incorporated Steven Fisher-Stawinski, IBM Corp. Christina Huang, Faegre Drinker Biddle & Reath LLP Benjamin Lin, Microsoft Corporation Rachael Rodman, Thompson Hine LLP A Global Injunction Playbook: Preliminary Relief, Discovery, and Forum Choice in Patent Litigation <i>Organizing Committee: International Patent Law & Trade</i> In high-stakes patent disputes, speed, evidence, and forum can determine whether interim relief is a real commercial tool. This session will compare how multiple jurisdictions approach preliminary injunctions and early evidence-gathering. Panelists will discuss what proof is needed, what discovery or targeted evidence tools are available, how urgency and validity issues affect outcomes, and when courts can grant relief with cross-border impact. <u>Moderator:</u> Mark Stewart, Merck & Co Inc. <u>Speakers:</u> Daniel Brook, Hogan Lovells Cadwalader Niels Hölder, Carpmiels & Ransford Young Kim, Kim & Chang Carlos Olarte, OlarteMoure & Asociados Kristin Wall, Norton Rose Fulbright Canada LLP





Program

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Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
12:00PM 1:45PM	Lunch & IP Expo <i>Lunch will be provided in the IP Expo Hall during this time frame. There are several activities for attendees to choose from (listed below). Space is limited. Attendees may also use this extended time to network or catch up on work.</i>
1:30PM 1:45PM	IP Hub Presentation: Vetting AI Vendors - A Due Diligence Framework for IP Practice As AI adoption accelerates, legal departments face growing pressure to evaluate an expanding range of tools and vendors. This session provides a practical framework for AI due diligence, focusing on the factors that truly differentiate solutions, including data governance, confidentiality, model transparency, and compliance with professional responsibilities. <u>Speaker:</u> Thomas Marlow , Black Hills AI
12:30PM 1:30PM	Concurrent Workshops How In-house IP Departments are Deploying AI This workshop will explore how in-house IP departments are actively deploying AI tools to enhance efficiency, decision-making, and strategic value. Led by Chief IP Counsel, the session will feature practical insights from corporate legal leaders on real-world use cases, governance considerations, and evolving best practices. Participants will gain perspective on how their peers are integrating AI into internal workflows, as well as expectations for how outside counsel and law firms are leveraging AI to support IP services. The discussion will highlight opportunities, risks, and future trends shaping the role of AI in IP management. <u>Moderator:</u> Ewa Davison , The Boeing Co. <u>Speakers:</u> Dan Choi , Microsoft Corporation Yen Florczak , 3M Innovative Properties Co. Corey Salsberg , Novartis Know Thyself: Why Self-Awareness May Be the Most Important Professional Skill Rarely Discussed <i>Organizing Committees: Women in IP; Wellness; Diversity, Equity & Inclusion; and Leadership Development</i> IP professionals are trained to understand extraordinarily complex systems by learning the science and technology behind inventions, mastering intricate legal frameworks, and helping clients navigate domestic and international IP regimes. However, little time is often spent on learning to understand ourselves. The ability to recognize patterns of thinking, feeling, and behaving profoundly shapes how we lead, make decisions, navigate conflict, collaborate, and foster inclusion. This workshop will guide participants through an exercise to uncover the patterns that shape perceptions and will provide the tools needed to recognize default thinking patterns, expand empathy, and apply awareness to support a more inclusive practice. <u>Facilitator:</u> Steph Melnychuk , Steph Melnychuk Coaching <u>Panelists:</u> Brian Brookey , Honingman LLP Sandra Nowak , Solventum Kaveh Rashidi-Yazd , Eaton Corporation Lisa Schroeder , BASF Corporation





Program

as of 8/21/2026

Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
1:45PM 2:45PM	Concurrent Sessions Worldwide Design Law Updates <i>Organizing Committee: Industrial Designs</i> This session will examine major global design law reforms and emerging trends. The UK and India both have pending proposals for design law reform that could harmonize and drastically change how designs are examined and enforced. The EU has already enacted design law reforms with Phase II implementation beginning in July. Australia is reviewing possible changes to their design laws with respect to GUIs and virtual designs while New Zealand already allows their registration. Speakers will discuss recent developments and offer tips on how to implement the current and future changes into a global portfolio strategy. <u>Moderator:</u> Brandon Clark, SLB <u>Speakers:</u> Ashwani Balayan, ALG India Law Offices LLP Wendy Crosby, Murgitroyd Sabine Kossak, Bardehle Pagenberg Partnerschaft MbB Robert Munro, Allens IP Risks and Strategic Considerations When Using AI to Generate Software Code <i>Organizing Committees: Software-Related Inventions; Copyright and Related Rights; and Trade Secrets</i> This session will examine key IP risks associated with AI-generated code. Topics include copyright authorship and ownership issues for AI-generated code; infringement; trade secret risks; risks of third-party/open-source code inclusion; U.S. Copyright Office disclosure and registration considerations when AI-generated code is combined with human-authored code; consequences of inaccurate copyright registrations; and practical governance including documentation, developer guidance, review protocols, and contractual safeguards. <u>Moderator:</u> Matthew Sarboraria, Oracle Corporation <u>Speakers:</u> Tom Burton, Siemens Corp. Rachel Fertig, DLA Piper LLP Ken Corsello, IBM Corp. Global Strategy for Effective Online Brand Protection in the AI Era <i>Organizing Committees: Anti-Counterfeiting & Anti-Piracy and International Trademark Law & Practice</i> Counterfeit “dupes” are more realistic than ever, online sellers are increasingly using more clever strategies to avoid takedowns, fake raid reports are becoming commonplace, and marketplaces have become inundated with reports of alleged infringement. This session will examine the growing challenges of policing infringement online. Speakers will cover enforcement trends, recent case law, AI detection tools, and best practices for brand protection. <u>Moderator:</u> Kirk Sigmon, KellDann Law PLLC <u>Speakers:</u> Christine Casaceli, Temu Jimmy Huang, East IP Michael Sweeney, Corsearch Kenya Williams, Thermo Fisher Scientific Inc.





Program

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Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
2:45PM 3:15PM	Break & IP Expo
3:15PM 4:15PM	Concurrent Sessions
	Global Enablement and Disclosure Strategies for AI-Related Patent Applications <i>Organizing Committees: AI, Data & New Emerging Tech; Asia Practice; Europe Practice; and Latin American Practice</i> This session will examine how major jurisdictions approach disclosure and enablement for AI-related inventions. It will highlight key legal standards, regional differences, and practical strategies for addressing non-deterministic AI systems. Examples include U.S. enablement case law (<i>Amgen v. Sanofi</i> , <i>Wands Factors</i>) applied to non-deterministic AI models; Europe's reproducibility of technical effect under Article 83 EPC; structural, evidentiary, and procedural differences between CNIPA, JPO, and KIPO; strategies to navigate India's 2025 CRI Guidelines and Section 3(k) bar; and Brazil's INPI proposed granular disclosure checklist. <u>Moderator:</u> Carl Kukkonen , Jones Day <u>Speakers:</u> Scott Higdon , Gray Ice Higdon, PLLC Kurtis MacFerrin , Google LLC Maria Malburg , Dannemann Siemsen Joel Moss , Google LLC
	All About the Looks: Unconventional Trademarks, Trade Dress, Design Patents & Industrial Designs <i>Organizing Committees: International Trademark Law and Practice and Industrial Designs</i> This session will explore the similarities and differences among unconventional trademarks (shapes and colours), trade dress, design patents, and industrial designs from both a U.S. and global perspective. Speakers will discuss strategic considerations for brand owners and designers, enforcement challenges, overlap and conflict issues, recent case law and legislative developments, and best practices for harmonizing these tools in international markets. <u>Moderator:</u> Anthony Prenol , CPST Intellectual Property <u>Speakers:</u> Dunstan Barnes , McDonnell Boehnen Hulbert & Berghoff LLP Brad Hattenbach , Rep Fitness Diane Gabl Kratz , Dolby Laboratories
	Reducing Patent Friction: Joint Licensing from the 1800s to AI Models Today <i>Organizing Committees: IP Licensing & Related Issues; AI, Data & New Emerging Technologies; & Standards Setting</i> This session will trace the evolution of joint licensing models with a focus on the new Shared AI License Foundation (SAIL). Speakers will examine patent pools, aggregators, and other defensive licensing communities. <u>Moderator:</u> Eli Mazour , Foley & Lardner LLP <u>Speakers:</u> Dan Choi , Microsoft Corp. Ken Corsello , IBM Corp. Antun Peakovic , Marelli North America Paul Ragusa , Baker Botts





Program

as of 8/21/2026

Tuesday, September 29

<u>TIME</u>	<u>FUNCTION</u>
4:30PM 5:30PM	Ethics in the Age of AI <i>Organizing Committees: Diversity, Equity & Inclusion; and AI, Data & New Emerging Technologies</i> This panel will explore the ethical and practical challenges of using AI in IP law practice, from hiring and conflicts assessment to drafting and evaluating work product. It examines core duties of competence, confidentiality, and candor, alongside supervision obligations under ABA Model Rules 5.1 and 5.3 and Formal Opinion 512. The session highlights risks posed by AI-generated outputs and addresses billing fairness and oversight. Attendees will leave with practical guidance and best practices for responsible AI use. <u>Moderator:</u> Ceyda Maisami, HP Inc. <u>Speakers:</u> Bryan Hart, Brooks Kushman P.C. Joanne Lecky, Murgitroyd Juda Strawczynski, CEO & Registrar, College of Patent Agents & Trademark Agents
6:00PM	Reception hosted by The Chartered Institute of Patent Attorneys (CIPA)





Networking Events

Networking events are an important part of what makes the IPO Annual Meeting so special. Create new connections and build relationships that last by participating in the following networking events.

Welcome Lounge

Featuring IPO's DEI Committee & Resource Groups, Wellness Committee, and Patent Agent Committee

Sunday, September 27, 1:00-4:00pm

This event will provide opportunities for attendees to learn more about IPO's Diversity, Equity & Inclusion Committee & Resource Groups, Wellness Committee, and Patent Agent Committee. Stop by when picking up your name badge to learn about the committees and how to get involved.

Welcome Reception

Sunday, September 27, 6:00-8:00pm

Renew acquaintances and make new friends by attending the Welcome Reception immediately following the opening session in the Waterfall Garden at the Sheraton Centre Toronto Hotel. Open to all registered attendees.

Sponsored by: Li & N IP Group

Fun Run/Walk

Monday, September 28, 6:15-7:30am

Join colleagues for a guided 5K fun run or 3K walk around downtown Toronto. 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

IP Expo Hall

Monday-Tuesday, September 28-29

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.

IP Hub

Monday-Tuesday, September 28-29

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

Breakfast & Breaks

Monday-Tuesday, September 28-29

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 28-29

Lunch will be served 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.

Special Event: Taste of Canada at Steam Whistle Brewery

Monday, September 28, 6:30-9:30pm

Annual Meeting attendees are invited to attend a dinner reception at Steam Whistle Brewing. Nestled in the heart of downtown Toronto, Steam Whistle Brewing is housed in the historic John Street Roundhouse, a beautifully restored 1929 railway facility that once served Canada's expanding railways. Guests will enjoy stunning views of the CN Tower and Rogers Centre, home of the Toronto Blue Jays.

The evening will showcase Canadian culture, with a menu inspired by regional flavors. Savor food and beverages while networking with peers in this uniquely Canadian setting.



Sponsored by: Smart & Biggar LP

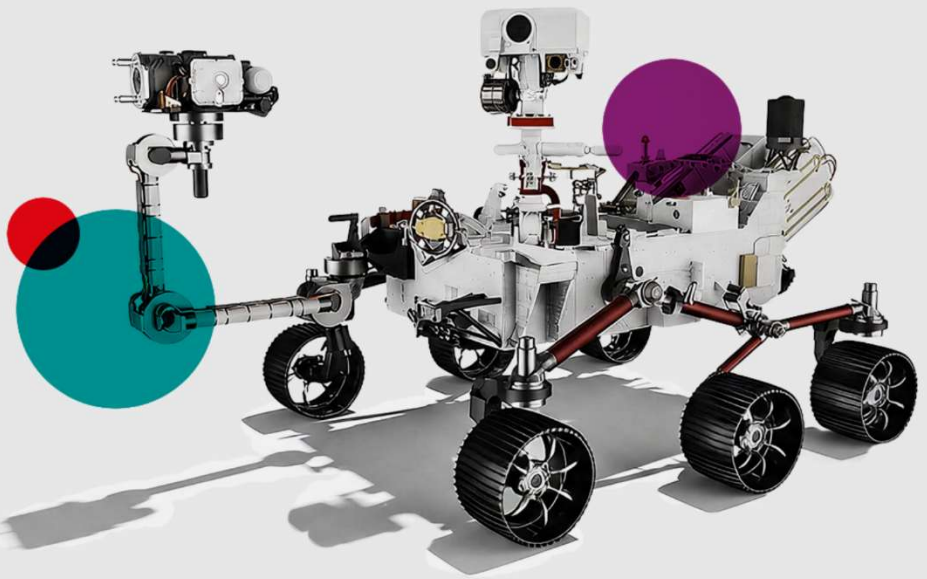
Transportation will be provided between the Sheraton Centre Toronto Hotel and the Steam Whistle Brewery. Buses will begin departing the hotel at 6:00pm. The last bus will return to the hotel by 10:00pm.

Attire: Casual – bring layers – there is an outside area and it could get chilly at night. Wear comfortable shoes.



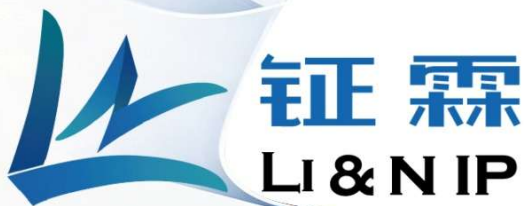
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CIPA Drinks Reception at IPO Annual Meeting 2026

Join the Chartered Institute of Patent Attorneys for a
networking drinks reception at the 43 Down Bar
following the conclusion of the annual meeting



Tuesday 29th September
6:00pm-9:00pm

43 Down, Sheraton Centre Toronto Hotel
123 Queen St W, Toronto, ON M5H 2M9

Book your place here:



CIPA THE CHARTERED
INSTITUTE OF
PATENT ATTORNEYS





Conference Information

Conference Location and Accommodations

Sheraton Centre Toronto Hotel
123 Queen St W, Toronto, ON M5H 2M9, Canada
[Online Reservation Link](#)

IPO has reserved a block of rooms at Sheraton Centre Hotel, where IPO's Annual Meeting is taking place. In order to receive the IPO group rate of **\$415 CAD per night** (single/double occupancy, plus taxes) for a single/double room, reservations must be made **by August 27, 2026** or until the room block is sold out, whichever comes first. After September 1st, rooms will be subject to availability at the standard hotel rate, if available.

Please note: IPO does **NOT** use a third-party reservation service. Attendees should **ONLY** make their hotel reservation using IPO's online hotel reservation link above or directly with the hotel.

Registration Fees & Name Badge Policy

Registration Fees include access to all education sessions; CLE Credit to applicable states; networking luncheons, breakfasts, and breaks on Monday and Tuesday (Sept. 28-29); Sunday Welcome Reception (Sept. 27); Monday Evening Reception (Sept. 28), and access to the IP Expo Hall (Sept. 28-29). *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 5 or more employees to attend the annual meeting will receive a rate of \$850 per registrant. *Complimentary registrations do not count towards the 5 minimum required to receive this discount. No other discounts apply.* Download the [Member Group Discount Registration Form](#) (fillable PDF) and return completed forms to meetings@ipo.org.

Guests Pass: Registrants may register for a guest pass for \$250 USD per person. The fee includes access to the Sunday welcome reception, continental breakfast on Monday and Tuesday, and the Monday evening reception. Guests do not receive CLE credit or access to education sessions. A guest is defined as a spouse, significant other, family member, or friend whose occupation is unrelated to the intellectual property legal profession. A co-worker or associate within the profession is not eligible for a guest pass.

Academic Rate: The academic rate is available only to individuals who are full-time employees of an educational institution. Individuals with concurrent employment outside their academic institution are not eligible.

Government Rate: The government rate is available only to individuals who are full-time employees of a U.S. or non-U.S. government entity. The employing entity must be officially recognized as a government organization by the individual's country.

Name Badge Ethics: Only persons registered for this conference are admitted access to the sessions, materials, and Meeting Platform. Sharing of badges and/or materials is prohibited.

Cancellation Policy

Cancellations received by Tuesday, September 1, 2026, will be subjected to a \$100 processing fee. No refunds will be given for cancellations received on or after September 1, 2026. Attendees are responsible for making their own hotel/travel arrangements and cancellations. These deadlines for cancellation apply to all registrants. Course materials via the mobile app will be available to those unable to attend who cancel on or after September 1. Refunds will not be given for no-shows. If a registrant is unable to attend, another person from the same organization may substitute upon written request. Please note that fees are not transferable to another IPO meeting or a person that is not from the same organization as the original registrant. We cannot apply a refund credit to another IPO meeting or event. Name badge sharing or splitting is strictly prohibited. IPO reserves the right to cancel this event without liability, and the total amount of any and all liability of the organizers will be limited to a refund of the registration fee. Any fees associated with the cancellation of travel or housing reservations are the exclusive responsibility of conference attendees.





Conference Information

Attendee List

Registration constitutes an agreement by the registrant for IPO to list the registrant's name, organization, and location on the attendee list. The attendee list is available to registrants via the IPO Annual Meeting App, which will open to attendees about **2 weeks** prior to the start of the meeting. An email with attendee's unique username/password for the Annual Meeting App will be emailed to attendees.

Meeting Photo Waiver and Release Policy

Registration and attendance at, or participation in, IPO meetings and other activities constitutes an agreement by the registrant for IPO to use and distribute (both now and in the future), the registrant or attendee's image or voice in photographs and audio/filming of such events and activities. These photos, audio, or film are for IPO use only and may appear on the IPO Website, newsletter, conference brochures, social media outlets, or other future IPO promotional material. This also includes photos uploaded by attendees using the IPO meeting platform or use of the public chat and forum platforms. For concerns about your image or likeness being used in this manner, please contact meetings@ipo.org.

Continuing Legal Education Credit

IPO will apply for CLE credit in all states that have MCLE requirements and Ontario. More information will be provided about which jurisdictions approved the Annual Meeting closer to the meeting.

Conference Attire

The preferred dress attire for conference functions is Business Casual. As meeting room temperatures and personal comfort zones vary widely, it is recommended that you bring a sweater or jacket to the sessions.





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

MEMBER TYPE	By 07/31/26	8/1 to 9/20	After 9/20/26
IPO Member	\$1,200	\$1,400	\$1,600
Non-Member	\$2,400	\$2,800	\$3,000
Government/Academic <i>No other discounts applies</i>	\$850	\$850	\$850
IPO Member Group Discount*	\$850	\$850	Must register before 9/20
Guest Pass**	\$250/person	\$250/person	\$250/person

APPLICABLE RATE:

IPO Member \$ _____

Non-Member \$ _____

Gov/Academic/Emeritus \$ _____

IPO Member Group Rate* \$ _____

Guest Pass \$ _____

Guest(s) Name(s) _____

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

TOTAL AMOUNT DUE: \$ _____

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. 28-29); Sunday Welcome Reception (Sept. 27); Monday Evening Reception (Sept. 28), and access to the IP Expo Hall (Sept. 28-29). *IPO does not provide a refund if an attendee chooses not to participate in any of the functions included with their registration fees.*

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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](https://www.ipo.org) 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](https://www.ipo.org) or call +1 202-507-4500.

2026 IPO ANNUAL MEETING



September 27-29, 2026
Sheraton Centre Toronto Hotel