

# 2018 Annual Meeting

## September 26-28, Swissôtel, Chicago, IL




### Everything Feels Different: How Should Boutique IP Firms Respond to Disruption?

#### Wednesday, September 26, 2018

2:00pm – 3:00pm <b>Lobby Lounge</b>	<b>AIPF Committee Meetings</b> <ul style="list-style-type: none"> <li>❖ Annual Meeting</li> <li>❖ Boutique Practice</li> <li>❖ Membership</li> <li>❖ Patent</li> <li>❖ Trademark</li> </ul>
3:00pm – 6:00pm <b>Bianco</b>	<b>Board of Directors Meeting</b>
7:00pm – 9:00pm	<b>Board of Directors and Annual Meeting Speakers Dinner</b> <i>(By Invitation Only)</i> Park Grill, 11 N. Michigan Avenue, Chicago, IL 60602

#### Thursday, September 27, 2018

7:30am – 6:00pm <b>Montreux Foyer</b>	<b>Registration</b>
7:30am – 8:30am <b>Montreux 3</b>	<b>Networking Breakfast</b>
8:30am – 8:40am <b>Montreux 1 &amp; 2</b>	<b>Welcoming Remarks</b> President's Report and Appointment to Election
8:40am – 9:30am <b>Montreux 1 &amp; 2</b>	<b>Keynote Speech What's New @ TTABVUE?</b> This presentation from Judge Kuczma will provide broad ranging insight into the USPTO's Trademark Trial and Appeal Board (TTAB) and will cover the TTAB's 60th Anniversary, updates on Amended Rules, Protective Orders, proposed streamlined cancellation proceedings, and recent TTAB decisions.  Moderator: <b>James Kayden</b> , Attorney, McClure, Qualey & Rodack LLP, United States  ❖ <b>Hon. Linda Kuczma</b> , Administrative Trademark Judge, United States Patent and Trademark Office, United States


<p>9:30am – 10:30am <b>Montreux 1 &amp; 2</b></p>	<p><b>Lessons Learned From Malpractice Claims Against IP Firms</b></p> <p>This session will discuss best risk management practices for IP firms in order to avoid malpractice claims. The speakers will use actual malpractice claim examples to illustrate issues that arise in IP boutiques. Topics covered will include engagement letters, docketing, client selection, and working with foreign associates.</p> <p>Moderator: <b><u>Christopher Agrawal</u></b>, Partner, <i>Bookoff McAndrews PLLC</i>, United States</p> <ul style="list-style-type: none"> <li>❖ <b><u>David Kramer</u></b>, Principal, <i>Gemini Risk Partners LLC</i>, United States</li> <li>❖ <b><u>Theodore Niffis</u></b>, Principal, <i>Gemini Risk Partners LLC</i>, United States</li> </ul>
<p>10:30am – 10:45am <b>Montreux 1 &amp; 2</b></p>	<p><b>Refreshment Break</b></p> <p>Sponsored by </p>
<p>10:45am – 11:45am <b>Montreux 1 &amp; 2</b></p>	<p><b>Management of a Trademark Practice in Times of Technological Change</b></p> <p>A discussion by an in-house trademark counsel and participants from law firms in diverse regions will explore best practices for management of an international trademark practice, taking into consideration the changing landscape of technology and focusing on how best to serve clients.</p> <p>Moderator: <b><u>Lynn Jordan</u></b>, Partner, <i>Kelly IP LLP</i>, United States</p> <ul style="list-style-type: none"> <li>❖ <b><u>Diego Cervieri</u></b>, Director, <i>Cervieri Monsuarez &amp; Asociados</i>, Uruguay</li> <li>❖ <b><u>David Moorhead</u></b>, VP &amp; Assistant General Counsel, <i>Hyatt Hotels Corporation</i>, United States</li> <li>❖ <b><u>Dario Pietrantonio</u></b>, Partner, <i>ROBIC</i>, Canada</li> </ul>
<p>11:45am – 12:45pm <b>Montreux 1 &amp; 2</b></p>	<p><b>Beyond the European Trademark and Design 2.0: IT and Legal Tools Available to Simplify, Enhance, and Promote the User Experience at the EUIPO in the Global Digital Era</b></p> <p>This presentation will show the audience the relevant implications to the role and work of the EUIPO as a consequence of disruptive factors that are currently at large. In particular, an overview will be given of some important aspects of the recent EU trademark Legislative Reform, as well as of the tools which are currently available to users. The presentation will also cover: factors of disruption which have most affected the EUIPO's work; the global market; digital communication; ISO quality standards and fast track option; 'new' types of codified marks which can be filed before the Office; limitations; and, legal tools for effective dispute resolution in the globalized market.</p> <p>Moderator: <b><u>Alberto Giordano</u></b>, Partner, <i>Martegani &amp; Partners</i>, Italy</p> <ul style="list-style-type: none"> <li>❖ <b><u>Stefano Di Natale</u></b>, IP Administrator and EU Official for the Fifth Board of Appeal, <i>European Union Intellectual Property Office</i>, Spain</li> </ul>
<p>12:45pm – 1:45pm <b>Montreux 3</b></p>	<p><b>Lunch</b></p>

## Legal Project Management Essentials: Learn How to Align Client Expectations with Practice Efficiencies and Profitability

<p>1:45pm – 5:00pm <b>Montreux 1 &amp; 2</b></p>	<p>Legal Project Management (LPM) helps firms to align with client expectations, increase speed of service delivery, and increase financial profitability. LPM helps lawyers to manage their time, teams, and clients. <b>LegalShift</b> believes LPM to be one of the most impactful changes that a law firms and law departments can institute. The problem? LPM requires lawyer education and a buy-in to behavioral and process changes.</p> <p><b>LegalShift</b>, a leader in legal consulting based in Chicago, will present an in-depth analysis of Legal Project Management (LPM) concepts and the practical application of these concepts. Participants in this interactive workshop will form into working groups and engage in guided, hands-on, collaborative exercises to apply LPM “best practices” in the operation of an IP boutique. Each participant will depart with a working knowledge of LPM discipline and with the ability to immediately apply these concepts and techniques.</p> <p>Moderator: <b><u>Eric Marzluf</u></b>, Senior Counsel, <i>Caesar Rivise PC</i>, United States</p> <ul style="list-style-type: none"> <li>❖ <b><u>Dan Safran</u></b>, President and CEO, <i>LegalShift LLC</i>, United States</li> <li>❖ <b><u>Scott Rosenberg</u></b>, Managing Director and Corporate Counsel, <i>Legal Shift LLC</i>, United States</li> <li>❖ <b><u>Carey Lambert</u></b>, Project Manager, <i>LegalShift LLC</i>, United States</li> </ul>
<p>5:00pm – 6:00pm <b>Geneva</b></p>	<p><b>Networking Reception</b></p>
<p>7:00pm – 9:00pm</p>	<p><b>Networking Dinner</b> Quartino, 626 N. State, Chicago, IL 60654</p>

## Friday, September 28, 2018

<p>7:30am – 12:45pm <b>Montreux Foyer</b></p>	<p><b>Registration</b></p>
<p>7:30am – 8:30am <b>Montreux 3</b></p>	<p><b>Networking Breakfast</b></p>
<p>8:30am – 9:30am <b>Montreux 1 &amp; 2</b></p>	<p><b>Navigating Discovery in Patent Litigation</b></p> <p>Sometimes explaining the differences in discovery rules among various jurisdictions to clients can be overwhelming when preparing for, or addressing, litigation brought in more than one locale. Two discovery-related topics that repeatedly lead to client confusion are (1) whether or not communications between a patentee and non-attorneys (e.g., patent agents) during the patent prosecution process are covered by the attorney/client privilege, and, (2) the preparation of non-US witnesses to face the wide scope of deposition testimony and document discovery permitted during litigation in United States Federal Court. To help tackle these issues, join us for this session that will focus on each of these topics</p>

	<p>separately, will explain the current law/practices relating to each, and will finish with an interactive discussion regarding the interplay between them (including, through fielding questions from the audience).</p> <ul style="list-style-type: none"> <li>❖ <b><u>Lisa Phillips</u></b>, Partner, <i>Rothwell Figg</i>, United States</li> <li>❖ <b><u>Megan Redmond</u></b>, Partner, <i>Erise IP PA</i>, United States</li> </ul>
<p>9:30am – 10:30am <b>Montreux 1 &amp; 2</b></p>	<p><b>Incorporating Pro Bono Work Into Your IP Practice</b></p> <p>This panel discussion will present options for the intellectual property attorney to participate in pro bono legal services. IP attorneys are ideally suited to provide assistance to start-up companies, small colleges, charitable organizations, churches and business incubators. Options also exist for helping the individual artist.</p> <ul style="list-style-type: none"> <li>❖ <b><u>Peter Brewer</u></b>, Partner, <i>Thrive IP</i>, United States</li> <li>❖ <b><u>Erik Pelton</u></b>, Founder, <i>Erik M. Pelton &amp; Associates PLLC</i>, United States</li> <li>❖ <b><u>Mary-Anne Smith</u></b>, Director of Chicago-Kent Patent Hub, <i>Chicago-Kent College of Law</i>, United States</li> </ul>
<p>10:30am – 10:45am <b>Montreux 1 &amp; 2</b></p>	<p><b>Refreshment Break</b></p> <p>Sponsored by </p>
<p>10:45am – 11:45am <b>Montreux 1 &amp; 2</b></p>	<p><b>Taking the Long View on Patents – A Roundtable Perspective on Navigating Patent Protection</b></p> <p>A select panel of Industry Leaders and Patent Attorneys will discuss how patent prosecution and enforcement strategy has changed and will continue to evolve as we navigate through rougher waters. Our clients today are acutely aware of the “patent troll” meme. More significantly, through the seemingly constant bad news, most clients have an awareness of the constant changes to patent eligibility, unpredictability of appeals in the PTAB and the CAFC, as well as the harsh treatment of patents in IPR proceedings. All of this has left clients questioning the usefulness of pursuing any patent protection. Despite all of the bad publicity, and the volatility associated with patent protection and enforcement, patents remain the best and often sole tool in our chest to protect innovation. We are in a time where our guidance as to the need for patents, the long view and the course with which we can best navigate through these turbulent times is of utmost significance.</p> <p>Moderator: <b><u>Ben Klosowski</u></b>, Partner, <i>Thrive IP</i>, United States</p> <ul style="list-style-type: none"> <li>❖ <b><u>Kimberly Chotkowski</u></b>, CEO, <i>Licensing Executives Society</i>, United States</li> <li>❖ <b><u>Christopher Clancy</u></b>, Vice-President, Legal &amp; General Counsel, <i>Panduit</i>, United States</li> <li>❖ <b><u>James Kellerman</u></b>, IP Counsel, <i>Astellas Pharma US Inc.</i>, United States</li> <li>❖ <b><u>Jovan Jovanovic</u></b>, Partner, <i>The Watson IP Group PLC</i>, United States</li> </ul>
<p>11:45am – 12:30pm <b>Montreux 1 &amp; 2</b></p>	<p><b>Today’s Legal Market Trends: How Boutique Firms Can Take Advantage</b></p> <p>There's no better way to definitively know what clients want than to ask. GrowthPlay has interviewed numerous purchasers of legal services and compiled today's Legal Market Trends based on their feedback. From</p>

	<p>providing legal advice in a business context to providing a budget (even when the client doesn't ask for one) to addressing business continuity concerns, we will discuss today's trends that every boutique firm should know. This program focuses on the 9 legal market trends reported by clients themselves, advice and practical tools to ensure you don't miss out on what clients are demanding of their outside counsel, and best practices for reinvigorating your business development plan in view of today's trends.</p> <p>Moderator: <b><u>Christopher Agrawal</u></b>, Partner, <i>Bookoff McAndrews PLLC</i>, United States</p> <p>❖ <b><u>Holly Barocio</u></b>, Principal Consultant, <i>GrowthPlay</i>, United States</p>
12:30pm – 12:40pm <b>Montreux 1 &amp; 2</b>	<b>Closing Remarks</b>
3:00pm – 4:30pm <b>Michigan Ave Dock</b>	<p><b>Architecture Boat Tour</b> (registration required, separate fee)</p> <p>Join the AIPF on a relaxing and informative boat tour featuring Chicago's rich architectural heritage and history.</p> <p>Attendees should meet in the lobby of the Swissôtel by 2:00pm to collect their tickets and proceed to Michigan Ave Dock.</p>

**All event materials will be available online at  
[www.aipf.com/2018info!](http://www.aipf.com/2018info!)**

• • •

**See you next year at the AIPF 2019 Annual Meeting!**

**Date: September 22-24, 2019**

**Location: Embassy Suites by Hilton in Alexandria, VA**

(Prior to IPO's Annual Meeting, September 24-26, 2019 at Marriott Marquis, Washington, DC)

# Annual Meeting Sponsors

## Silver Sponsors

**LegalShift**



FÉDÉRATION INTERNATIONALE DES CONSEILS  
EN PROPRIÉTÉ INTELLECTUELLE

INTERNATIONAL FEDERATION OF  
INTELLECTUAL PROPERTY ATTORNEYS

INTERNATIONALE FÖDERATION  
VON PATENTANWÄLTEN

## Bronze Sponsors



## Media Sponsors



**CHICAGO**  
Intellectual Property Alliance

