

## **FINANCIAL POISE WEBINARS PATENT PREPARATION, PROSECUTION & PORTFOLIO MANAGEMENT**

### **ABOUT THIS SERIES**

Aspects of Patent Preparation, Prosecution and Portfolio Management involve intricate interactions between those managing and those carrying out the efforts, be that within a common entity or involving outside counsel. In particular, using outside counsel to assist in patent application preparation and prosecution is an incredibly valuable manner in which to generate and maintain a robust patent portfolio.

Having patent applications prepared and prosecuted by outside counsel can improve short-term workflow management and provide many long-term advantages once a patent has issued. However, utilizing outside counsel can be costly, ensuring quality can be challenging and managing patent portfolios can require a balance of information not always available to all involved.

Whether working with a small or large number of outside firms and whether they are small or large in size, this webinar series provides insight that will assist both inside and outside counsel in creating a more effective working relationship.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.



### **About Episode #1**

#### **Patent Application Preparation**

September 18, 2018 at 1:00 PM CST

Managing the patent drafting process requires interaction amongst many parties, at the least including an inventor, outside counsel and in-house counsel or other management. This may expand to include multiple inventors, licensing and/or marketing input and different levels of management, both in-house and in an outside firm.

Managing this group to achieve a high quality patent application that is accurate from the standpoint of the inventor(s) and related technologies, cognizant of current law and ongoing changes, relevant to a business purpose and efficient with respect to the inventor's time, all while enabling outside counsel to remain profitable, can be challenging. This webinar provides insight into these aspects, with experienced panelists on both sides of the fence.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

### **About Episode #2**

#### **Patent Prosecution**

October 16, 2018 at 1:00 PM CST

Patent prosecution can be managed and carried out using a variety of approaches. Some managing counsel prefer to be highly involved, while others are more apt to let those carrying out the prosecution run with things.

Attorneys (or patent agents) doing the work of response drafting, brief drafting, carrying out interviews and other tasks employ many different approaches and strategies.

This webinar provides insight as to how to efficiently manage those carrying out the work of patent prosecution, whether inside or outside counsel, while ensuring quality. This webinar further addresses

important issues relative to maintaining proper control and achieving the insight needed to ensure that the prosecution process is in line with business and technical needs as they evolve.

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### **About Episode #3**

#### **Patent Portfolio Management**

November 13, 2018 at 1:00 PM CST

Patent portfolio management starts at the inventive stage and doesn't end until a patent is no longer active. Strategies vary widely and goals may evolve over time. Future events, such as those relating to licensing and litigation, can greatly affect such strategies. As patent portfolios grow, management becomes more difficult as does ensuring that the efforts (and expenditures) being made are appropriate.

This webinar provides a variety of perspectives that will be useful in ensuring that your patent portfolio is robust, purposeful and managed effectively.

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