

Patent Due Diligence



Topics

- Key issues in a patent due diligence
- Process, milestones and strategies
- Evaluating a patent due diligence: due diligence reports, typical risks, how to minimise the risks
- IP provisions in acquisition contracts
- Dos and don'ts in a patent due diligence
- Best practices from the perspective of an industrial corporation

Learn the dos and don'ts
of a patent due diligence

Your speakers



Martin Bodi
Patentanwalt,
European Patent Attorney,
Senior M&A Counsel,
Siemens AG,
Munich (Germany)



Barbara Reilly
Senior Legal Counsel,
Siemens AG,
Munich (Germany)

Patent Due Diligence

Aims and objectives

Acquisitions and divestments of businesses normally involve a patent due diligence. Those participating in a patent due diligence need to know what has to be done from the first contact to the integration of the target. Our speakers will discuss strategies for a patent due diligence and how you can evaluate them. You will learn how a patent due diligence can be conducted efficiently as well as the IP provisions you need to pay attention to in acquisition contracts. Benefit from the experiences of a leading industry corporation and take away best practice examples for conducting a patent due diligence!

Who should attend?

Do you work in a corporate IP/patent/legal department or as a patent attorney/attorney-at-law in private practice and need to know how to deal with a patent due diligence? Then this course is designed for you. Knowledge of IP law is required.

What our participants say

- 'Good Content and professional performance' (IPR Manager)
- 'I liked the workshop and the event format' (European Patent Attorney)
- 'Helpful and relevant practical examples and fast cases' (Patent Attorney)

Your speakers



Martin Bodi
European Patent Attorney,
Senior M&A Counsel,
Siemens AG,
Munich (Germany)

Martin is a M&A Counsel in the patent department of Siemens AG since 2011. In this function he conducts international Patent Due Diligence processes and counsels the Siemens business divisions with regard to international acquisitions of smaller and larger companies and with regard to Joint Venture projects. As Head of Patents and Standards Martin provides advice on patent relevant subjects in the sphere of technical standardisation.



Barbara Reilly
Senior Legal Counsel,
Siemens AG,
Munich (Germany)

Barbara has been working at Siemens Legal in Munich as Senior Legal Counsel since December of 2000. She co-heads Siemens' global Technology Practice Group with about 200 members from Siemens' legal and patent departments. She is specialized in the area of IP- und IT-law, including IP and IT issues in M&A transactions, international R&D arrangements and software topics, such as Open Source Software. She received her J.D. from Georgetown University Law Center in Washington DC. Before joining Siemens, she worked in the legal departments of Schering AG and Krone AG in Berlin.

3 December 2019, 09:00 - 17:00

Patent due diligence in acquisitions (incl. know-how and software)

Key issues in patent due diligence

- Patent validity, enforceability and scope
- Ownership of patent
- Freedom to operate; (threatened) litigation
- Excursus: (open source) software, trade secrets
- Overview: trademarks

Case study 1 :

Process, milestones and strategies in a patent due diligence: from the first contact to the integration of a target

- Data request questionnaire; Responses and data room disclosure
- IP expert session
- Contract negotiations
- Signing; closing, integration

IP provisions in acquisition contracts

- Asset deal vs. share deal
- Definitions
- Reps and Warranties/Disclosures

Case study 2 :

Evaluating a patent due diligence: from the due diligence to the decision to purchase

- Purpose and content of due diligence reports
- Typical patent risks and mitigation measures
- Know-how protection and non-disclosure agreements
- Disclaimers

Best practices

- What is to be considered in a patent due diligence from buyer and from seller perspective
- Typical problems in a patent due diligence
- Dos and don'ts in a patent due diligence
- Patent due diligence in a major M&A project

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Patent Due Diligence

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Registration: +49 6221 500-500

Conference no.: 19 12 173

Website:
www.forum-institut.com

Date and venue
Tuesday, 3 December 2019 in Munich
09:00 - 17:00
Novotel Munich City Arnulfpark
Arnulfstr. 57 · 80636 Munich
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Fee
€ 1120.00 (+ German VAT)
The fee includes course documentation (including free download) as well as refreshments, lunch and a certificate. You will receive an invoice as well as confirmation.

Any Further Questions?



Please feel free to contact me if you have any questions.

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