



The 9th Annual IP Dealmakers Forum

Driving IP Transactions

December 6-8, 2022 • NYC & Virtual

ABOUT THE EVENT

The 9th Annual IP Dealmakers Forum will be held on December 6-8, 2022 at Apella in NYC & virtually. Widely considered the industry's premier gathering, the event will once again bring together a select group of thought leaders and decision-makers at the forefront of the global intellectual property market for discussion, debate, and dealmaking.

Event hallmarks include high-quality content, A-list speakers, 1-to-1 meetings, and a curated audience of senior executives, including corporate IP owners, licensing company executives, tech transfer officers, litigation funders, investors, strategic advisors, and other key stakeholders.

Thank you to our generous sponsors for their support: Fabricant LLP, Acacia Research Group, Aon, Mintz, Qualcomm, Robins Kaplan, Adeia, Brown Rudnick, Caldwell IP, Curiam Capital, Fortress Investment Group, Gowling WLG, IPVALUE, Liston Abramson, Longford Capital, McKool Smith, RPX Corp, Spencer Fane, Tech+IP, Validity Finance, WIT Legal, Pretium Partners, Owlpoint Capital, Kramer Day, Soryn IP Capital, and CASe Analysis Group.

For more details regarding the event visit: [IPdealmakersforum.com](https://ipdealmakersforum.com).

PRELIMINARY AGENDA

(Times Listed in ET | Topics and Speakers Subject to Change)

DAY ONE: TUESDAY, DECEMBER 6TH

6:00 PM – 8:00 PM

Opening Reception

DAY TWO: WEDNESDAY, DECEMBER 7TH

7:45 AM – 8:45 AM

Registration & Breakfast

8:45 AM – 9:00 AM

WELCOME & CHAIRPERSON'S OPENING REMARKS

9:00 AM – 5:00 PM

ONE-TO-ONE MEETINGS

Attendees can schedule 30-minute meetings via our online platform

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9:00 AM – 10:00 AM

STATE OF THE IP MARKET: NOTABLE DEVELOPMENTS & DEALS OF 2022

- The year's biggest verdicts, settlements and deals
- Updates at the USPTO – how is Vidal doing?
- Patent reform: will it really happen & will it be what we need?
- Opportunities, outlook, and predictions for 2023

Speakers:

Elvir Causevic, Managing Director, **Tech + IP** (moderator)

Aaron Fahrenkrog, Partner, **Robins Kaplan**

Keith Wilson, EVP, Partnerships & Acquisitions, **IPVALUE**

Additional speakers TBD

10:00 AM – 10:45 AM

THE VENUE DECISION: STATS & STRATEGY AT TOP U.S. PATENT COURTS

- The WDTX order and new venue developments
- Review of key stats in TX, DE, CA, VA & other busy patent courts
- District court dynamics and strategic filing considerations
- Identifying the new hotspot

Speakers:

Fred Fabricant, Managing Partner, **Fabricant LLP** (moderator)

Michelle Eber, Portfolio Counsel, **Validity Finance**

Claus Melarti, Senior VP, Acquisitions, **RPX**

Erick Robinson, Partner, **Spencer Fane**

Additional speaker TBD

10:45 AM – 11:15 AM

Networking Break

11:15 AM – 12:00 PM

AROUND THE WORLD: STRATEGIC APPROACHES TO GLOBAL SEP DISPUTES

- Recent rulings in key global jurisdictions
- Developments at the ITC and in US courts
- How the UPC impacts European SEP/FRAND strategy
- The latest on global rate setting

Speakers:

Michael Renaud, Chair of IP Division, **Mintz** (moderator)

Alexandra Brodie, Partner, **Gowling WLG**

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Joshua Budwin, Principal, **McKool Smith**
Steven Geiszler, U.S. Chief IP Counsel, **Huawei**
Clemens Heusch, Global Head of Dispute Resolution, **Nokia**

12:00 PM – 12:30 PM

KEYNOTE TBD

12:30 PM – 2:00 PM

Networking Luncheon

2:00 PM – 2:45 PM

IP FINANCE ROUNDTABLE PART I: EXPANSION OF LITIGATION FUNDING

- Funders' view of the patent litigation landscape
- Evolving areas of funding: From patents to portfolios to partnerships
- Use of SPVs and other creative deal structures
- Funders hedging risk with insurance & secondary market

Speakers:Ian DiBernardo, Partner, **Brown Rudnick** (moderator)Russell Genet, Director, **Longford Capital**Anup Misra, Director, **Curiam Capital***Additional speakers TBD*

2:45 PM – 3:30 PM

IP FINANCE ROUNDTABLE PART II: LEVERAGING IP TO RAISE GROWTH CAPITAL

- New IP-backed financing options (beyond litigation finance)
- Who's raising IP funding? How does it match up to traditional capital?
- Breakdown of deal diligence, valuation, and structuring
- Understanding the interplay with insurance

Speakers:Nick Chmielewski, Chief Broking Officer, **Aon** (moderator)D. Alexander Ewing, COO & General Counsel, **LiquiGlide**Christopher Lipuma, Vice President, **Fortress Investment Group**Drew Malozzi, Managing Director and Founder, **Atlas Credit Partners***Additional speaker TBD*

3:30 PM – 4:00 PM

Networking Break

4:00 PM – 4:45 PM



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BUILDING A MODERN DAY MONETIZABLE IP PORTFOLIO

- Protecting innovation in the U.S. – is it still worth patenting?
- When is it best to protect as a trade secret and how?
- Seeking protection outside the U.S. in critical spots
- Best practices in managing the portfolio

Speakers:

Cyrus Morton, Partner, **Robins Kaplan** (moderator)

Lorie Goins, Director of IP Strategy, **Kendryl**

William LaFontaine, General Manager, IP, **IBM**

Additional speakers TBD

4:45 PM – 5:45 PM

THE NPE DEBATE: WHAT'S THE VALUE OF IP LICENSING AS A BUSINESS

- Who should license IP and why?
- Should there be a secondary market for IP?
- What's the interplay with politics and other interests?
- What's really best for innovation? How about global competition?

Speakers:

Marc Booth, Chief IP Officer, **Acacia Research Group**

Francis Rushford, Managing Director, **Pretium Partners**

Timothy Wilson, Head of Patents and IP Litigation, **SAS Institute**

Additional speakers TBD

5:45 PM – 6:45 PM

Networking Reception

DAY THREE: THURSDAY, DECEMBER 8TH

8:00 AM – 8:45 AM

Registration & Breakfast

8:45 AM – 9:00 AM

CHAIRPERSON'S DAY ONE RECAP

9:00 AM – 4:00 PM

ONE-TO-ONE MEETINGS

Attendees can schedule 30-minute meetings via our online platform

9:00 AM – 9:45 AM

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SEP DEALMAKING: EXPLORING VALUES, MODELS & THE MARKET

- Current SEP landscape
- SEPs in the market: what's being litigated, licensed, bought & sold?
- At what values are SEPs being transacted in and outside of the courts?
- Patent pools & licensing models to increase market efficiency

Speakers:Leonid Kravets, Head of M&A, **InterDigital**Kavon Nasabzadeh, Chief IP Officer, **Offino Technologies***Additional speakers TBD*

9:45 AM – 10:30 AM

SECTOR SPOTLIGHT: IP IN AUGMENTED REALITY, THE METAVERSE AND AI

- Developments in the tech landscape
- Building a strategic IP portfolio & dealing with patentability issues
- Examining IP litigation trends and identifying risks
- Patent pools, standards, and the market efficiency

Speakers:Michael Connolley, VP of Operations, **WIT Legal** (moderator)Mark Kokes, SVP, Global Head of Media IP Business, **Adeia**Shui Li, Corporate Counsel, Cloud +AI, **Microsoft**Shayne O'Reilly, Head of Licensing & Open Source, **Meta***Additional speaker TBD*

10:30 AM – 11:00 AM

Networking Break

11:00 AM – 11:45 PM

RETHINKING UNIVERSITY IP MONETIZATION: NEW OPPORTUNITIES & APPROACHES

- Mining for the highest value patents
- Leveraging IP to raise capital for spinouts and startups
- Patent assertion programs and funding partners
- Controlling the process and communications

Speakers:Katherine Rubino, Partner, **Caldwell IP** (moderator)Stephanie Adamany, General Counsel, **WARF**Orin Herskowitz, Executive Director, **Columbia Technology Ventures**Lesley Millar-Nicholson, Executive Director, **MIT Technology Licensing Office**Marc Sedam, VP Technology Opportunities & Ventures, **NYU**



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11:45 AM – 12:30 PM

PATENT SURVIVOR: WHAT IT TAKES TO SURVIVE A SERIES OF CHALLENGES

We'll wrap up this year's panels with a light-hearted and informative game designed to help the audience figure out what makes a patent valuable. Fashioned after the famous reality show series, our panel of experts will act as judges, reviewing a carefully curated selection of patents, to determine which ones get voted off the island and which ones survive. The series of challenges include the following:

- Does it pass the PTAB gauntlet?
- Can it get out of the 101 maze?
- Invalidity at trial
- Have to have an infringement case/Is it really infringed?

Speakers:

Charles Eldering, CEO, **CASe Analysis Group** (moderator)

Ari Jaffess, Partner, **Liston Abramson**

Vincent Rubino, Partner, **Fabricant LLP**

Bridget Smith, Assistant General Counsel, IP, **Relativity Space**

Jonathan Stroud, General Counsel, **Unified Patents**

12:30 PM – 2:00 PM

Networking Luncheon

2:00 PM – 4:00 PM

ONE-TO-ONE MEETINGS CONTINUE

2:00 PM – 4:00 PM

NEW! OPEN WORKSHOP LOUNGE

Join us for our new open workshop lounge – designed as an alternative to one-to-one meetings for those who prefer connecting informally or in groups. We invite you to grab a seat at one of our roundtables, where you and your colleagues can brainstorm, problem solve, discuss opportunities, or just hang out. Snacks and refreshments will be provided, but BYOT (bring your own topic) for discussion!

4:00 PM – 5:00 PM

Closing Reception

5:00 PM

Event Concludes