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THE 15TH ANNUAL SUMMIT ON PROTECTING INNOVATIONS in the FINANCIAL SERVICES INDUSTRY

JULY 25 – 26, 2018 • SHERATON NEW YORK TIMES SQUARE HOTEL
NEW YORK CITY, NY

EXPLORE THE DISRUPTIVE
INNOVATIONS THAT ARE
REVOLUTIONIZING THE
FINANCIAL SERVICES
INDUSTRY AND DISCUSS
THE RELEVANT IP ISSUES

KEYNOTE ADDRESS:



Hon. Susan Braden
Chief Judge
**UNITED STATES
COURT OF
FEDERAL CLAIMS**

\$101 ELIGIBILITY REFORM PANEL:



Joe Matal
USPTO



Scott Partridge
Chair, Section
of Intellectual
Property
ABA



Barbara Fiacco
First Vice
President
AIPLA



Manny Schecter
Board Member
IPO

NEW FOR 2018:

- Explore the impact of artificial intelligence and blockchain technology on the financial services industry
- Evaluate the current health of our patent system — Gauge whether this is a symptom of a larger ailment
- Examine both the benefits and the risks of engaging with FinTech companies
- Discuss the procedural and substantive changes happening within patent law — From §101 eligibility to the PTAB
- Explore developments, challenges, and opportunities with the implementation of GDPR and imminent launch of the European Unified Patent Court

IN-HOUSE COUNSEL PERSPECTIVES FROM:

- American Express
- Bank of Montreal
- CBEO Global Markets
- Citigroup
- The Clearinghouse Payment Company LLC
- CME Group
- Cote Capital
- Equifax
- Early Warning
- Fannie Mae
- Groupon
- The Hartford
- IBM
- JPMorganChase
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- Royal Bank of Canada
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- Wells Fargo
- ...and more!

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PARTNERS:



PARTNERS:



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WHO SHOULD ATTEND:

Executives from the Financial Services Industry and FinTech with responsibilities and roles including:

- General Counsel
- Patent Counsel
- IP Counsel
- Chief Information Officer
- Chief Privacy Officer
- Chief Risk Officer
- Vice Presidents and Directors of:
 - Intellectual Asset Management
 - Patent Innovation
 - Product Development
 - Technology Planning
 - Research & Development

This conference also benefits law firms, consultants, patent agents, venture capitalists, inventors, investors, and service providers.

Dear Colleague,

This past year, the financial services industry has been confronted with new opportunities and risks as the patent landscape continues to present new challenges to in-house counsel. From disruptive innovations to *Oil States*, there is no shortage of new and exciting developments. With companies beginning to adopt blockchain technology and the continued development of artificial intelligence, the financial services industry must grapple with these new technologies and the patent issues that come with them. While these new technologies challenge traditional infrastructure and norms, there are also FinTech startups that longstanding financial service companies may want to acquire or partner with, which raises new transactional and IP concerns. Meanwhile, against the backdrop of these disruptive innovations, the courts have continued to send mixed signals by handing down new decisions that have changed the PTAB and 101 eligibility.

This year's **Protecting Innovations in the Financial Services Industry** is an opportunity for in-house counsel in the financial services industry to gather with peers and determine the best practices and strategies to navigate the changing tides. Join us as we discuss the most pressing issues facing corporate counsel in the financial services field, including:

- The impact of recent and upcoming case law on the financial services industry
- The introduction and development of blockchain technology
- The maturing artificial intelligence technology
- Whether to partner, acquire, or assist FinTech companies
- The implementation of the GDPR

Now in its 15th year, the Patents for Financial Services Summit continues to offer new and exciting discussions for in-house counsel to consider and debate with colleagues. I look forward to seeing you at this year's event.

Sincerely,

Martin Tartre

Martin Tartre, Esq.
Director, Legal Conferences
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DAY ONE – WEDNESDAY, JULY 25, 2018

7:00 Summit Registration and Morning Coffee

8:00 Chairperson's Welcome and Opening Remarks



Kevin Culligan
Shareholder
MAYNARD COOPER & GALE

8:10 KEYNOTE ADDRESS: Gain Insight on the Changing Patent Landscape from the Chief Judge of the U.S. Court of Federal Claims

The American patent system has continued to be a source of controversy for both the business community and practitioners alike. The eligibility issue continues to offer uncertainty, and the Patent Trial and Appeals Board has been subject to both criticism and praise. During this Keynote Address, gain Chief Judge Susan Braden's perspective on the changing patent landscape.



Hon. Susan Braden
Chief Judge
U.S. COURT OF FEDERAL CLAIMS

9:00 Assess the Health of the U.S. Patent System and Discuss the Erosion of Patent Rights

For years, there has been a consistent downward trend in patent litigation. Companies are shying away from enforcing their patents, and even litigation financing firms have been hesitant to invest in American patent litigation. In this panel, explore the various causes of the litigation plummet.

- Evaluate the current patent landscape
- Diagnose the downward trend in patent litigation
- Formulate strategies for protecting financial innovations



Leslie Spencer
Partner
ROPES & GRAY



Steve Klocinski
Senior IP Counsel
MASTERCARD



Dan Pirolo
Senior Vice President and Senior Counsel
SYNCHRONY



Moshe Malina
Director and Chief Patent Counsel
CITIGROUP

9:50 Networking and Refreshment Break

Hosted by: **FRIED FRANK**

10:20 Analyze Recent and Upcoming Cases Affecting the Patent Landscape for the Financial Services Industry

While the *Oil States* case has captured significant attention from both practitioners and the media, there are several other important pending patent cases that could have a substantial and long-term impact. This panel discusses several important cases that may alter the patent landscape for the financial services industry.



Jonathan DeFosse
Partner
FRIED FRANK



Robert Masters
Partner
FRIED FRANK



David Cunningham
Assistant General Counsel
THE HARTFORD



Robert Glance
Senior Vice President and Managing Counsel
WELLS FARGO

11:10 Embrace Change at the PTAB

Cases being addressed by the Supreme Court, as well as recent Federal Circuit rulings in *Aqua Products v. Matal* and *Wi-Fi One v. Broadcom*, signal that change is coming to the PTAB, and with it, opportunities for savvy practitioners who are willing and able to adapt. In *Aqua Products*, for example, the Federal Circuit overturned a PTAB rule that put the burden of proving the patentability of proposed amended claims squarely on patent owners. In the wake of this decision, patent owners have begun to consider pursuing amendments in PTAB proceedings where they had previously overlooked amendment opportunities. In another example, the Federal Circuit's *Wi-Fi One* ruling signaled that certain PTAB institution decisions may be subject to appealability on a broader range of issues than previously thought, and practitioners can be expected to test those boundaries. Discuss the opportunities presented by these cases as well as others.



Karl Renner
Partner
FISH & RICHARDSON



Michael Zoppo
Partner
FISH & RICHARDSON



Matthew Kelly
Managing Director
and Chief Intellectual
Property Counsel
CME GROUP



William Jacobson
IP Counsel
BANK OF AMERICA



Jordan Newmark
Litigation Counsel
**MIAMI
INTERNATIONAL
HOLDINGS, INC.**

DAY ONE – WEDNESDAY, JULY 25, 2018

12:00 Luncheon

1:00 **Blockchain, Bitcoin, Alt Coin, and Tokens: A Primer on How Intellectual Property Laws Relate**

Since 2008 when Nakamora Satoshi introduced Bitcoins to the world, the use of cryptocurrencies and blockchain technologies have become a disruptor to the financial service industry. This panel provides a brief overview of the technology involved and terminology used and then walks through intellectual property considerations that in-house counsel should take into account from the growth of this new paradigm in asset management tools.



Charlie Macedo
Partner
**AMSTER, ROTHSTEIN &
EBENSTEIN, LLP**



Sarah Duda
Assistant General Counsel
CBOE GLOBAL MARKETS



Milan Jovanovic
Vice President and
Assistant General Counsel
JPMORGAN CHASE



Jim Howard
Vice President,
Associate General Counsel
**THE CLEARING HOUSE
PAYMENT COMPANY LLC**
Associate General Counsel
ASKELADDEN LLC

1:50 **Follow the Changes in §101 Eligibility**

Every year, §101 patent eligibility evolves, and these gradual changes provide new and controversial challenges for both patent attorneys and the financial services industry. As such, financial service companies should maintain an awareness of the recent developments in §101 case law.

- Address the substantive eligibility issues specific to the financial services industry
- Discuss eligibility in relation to financial products and services



Joe De Frank
Senior Patent Counsel
WELLS FARGO



Michael Young
Partner
**FINNEGAN, HENDERSON, FARABOW,
GARRETT & DUNNER LLP**



Marc Butterly
Founder & CEO
MARKETMAKER SOFTWARE, LTD

2:40 Networking and Refreshment Break

Hosted by: 

3:10 **SPOTLIGHT SESSION**



Pursue §101 Eligibility Reforms

The current eligibility regime has been criticized for its inherent uncertainty, especially in relation to business method patents and financial products. A number of intellectual property organizations have proposed legislative reforms. In this panel, hear from representatives of the ABA, IPO, AIPLA, and USPTO and discuss each legislative reform.

Moderator:



David Pridham
Chief Executive Officer
DOMINION HARBOR ENTERPRISES, LLC.

Panelists:



Scott Partridge
Chair, Section of Intellectual
Property
ABA



Barbara Fiacco
First Vice President
AIPLA



Manny Schechter
Board Member
IPO



Joe Matal
USPTO

4:30 **Evaluate Effective and Efficient Patent Portfolio Strategies**

Like any asset, patents hold value, can be leveraged, borrowed against, sold, enforced, or licensed. But in order to leverage a patent portfolio defensively to protect a company's interests, patent holders need to properly plan and develop an effective filing strategy. Understand the issues and trends faced by corporate counsel for developing a patent portfolio and learn best practices for portfolio development that will allow your organization to use IP as a shield to protect against different organizations and risks.

- Understand the strategies for building a strong defensive patent portfolio by reconsidering patent filings and acquiring new patent assets.
- Hear how in-house counsel are using strong patent portfolios as protection against various business risks
- Learn the best practices for handling a patent portfolio during an acquisition or merger



Joe Klinicki
Partner
CONDO ROCCIA KOPTIW, LLP



Elizabeth Lester
Assistant General Counsel
EQUIFAX



Colm Dobbyn
General Counsel
MASTERCARD

DAY ONE – WEDNESDAY, JULY 25, 2018

5:20

ROUNDTABLE DISCUSSIONS:

Learn to Protect Your Financial Innovations with Design Patents

While utility patents garner significant attention, the design patent is an effective and efficient strategy for protecting innovation in the financial services industry. Design patents play an important role in protecting the appearance of user interfaces to safeguard brand and customer experience. Discuss the latest developments in design patent preparation and prosecution.



Warren Johnson
IP Counsel
EARLY WARNING

Software Patents in Europe and Block Chain Patenting Trends

Europe continues to offer unique and exciting strategies for in-house counsel in regards to patenting software and other financial innovations. During this roundtable, understand the issues and trends coming out of Europe's patent system, and learn how block chain is creating interesting patent issues.



Justin Hill
Partner
DENTONS

Explore the Effects of Third-Party Litigation Financing

With third party litigation financing becoming more common, the impact on the patent landscape is starting to become visible. During this round table, discuss the effects of third-party financing on both the procedural and substantive law.

- Evaluate the current litigation financing environment
- Examine how third-party financing affects settlements
- Learn strategies for handling litigation funded by third parties



Joe Long
Assistant General Counsel
WELLS FARGO

5:50

Cocktail and Networking Reception

Hosted by:  **Microsoft**

DAY TWO – THURSDAY, JULY 26, 2018

7:30

Morning Coffee

Hosted by:  **FISH & RICHARDSON**

8:30

Chairperson's Welcome and Review of Day One



Kevin Culligan
Shareholder
MAYNARD COOPER & GALE

8:40

Investigate the Impact of the *Oil States* Decision

Oil States challenged the constitutionality of the PTAB's authority to extinguish patent rights in an inter partes review proceeding. The *Oil States* case is illustrative of the different perspectives on patent rights and patent policy. Even with the case closed, the discussion still continues.

- Explore what the holding means and what it doesn't mean
- Evaluate the strategies and actions being taken as a result of the holding
- Examine the tension between *Oil States* and *SAS Institute*



Stephen Schreiner
Partner
GOODWIN PROCTER LLP



Maxine Graham
Chief IP Counsel
AMERICAN EXPRESS



Timothy Bedard
VP and Chief Patent Counsel
VISA



Peter Leung
Legal Editor
BLOOMBERG LAW

DAY TWO – THURSDAY, JULY 26, 2018

9:30

IP Considerations for the Digital Transformation of the Financial Services Industry

The financial services industry is constantly adapting to meet the changing digital economy. The industry has become almost completely digitalized, and with this change, there are new intellectual property issues for in-house counsel to confront. In this session, discuss IP issues and opportunities for in-house counsel to consider as the world becomes more digital.



Wendy Callaghan
Chief Innovation Legal Officer
and Associate General Counsel
AIG



Panagiota Dafniotis
Assistant General Counsel
ROYAL BANK OF CANADA



Laura Himelstein
Vice President and
Assistant General Counsel
EXL



Nicolas Schifano
Senior Director and
Assistant General Counsel
MICROSOFT

10:20

Networking and Refreshment Break

10:50

Explore the Patent Issues Confronting Artificial Intelligence

In years to come, AI will continue to develop and disrupt different industries and our institutions. Soon, corporate counsel can take advantage of the AI to automatically and independently create an eligible business method patent and evaluate patent portfolios. The financial services industry will face new issues regarding artificial intelligence.

- Explore the crossroads between artificial intelligence and financial patents
- Determine the advantages and disadvantages to incorporating AI into your patent portfolio



Brad Lawrence
Partner
CANTOR COLBURN, LLP



Larry Bromberg
Executive Director and
Global Head of Intellectual
Property Legal
MORGAN STANLEY



Tanguy de Carbonnieres
Deputy General Counsel
FANNIE MAE



Joshua Death
Associate Vice President,
IP, and Patentable
Innovations
TD BANK



Rodger Sadler
Managing Director and Head
of Legal & Intellectual Property
COTE CAPITAL

11:40

Increase Patent Portfolio Value by Optimizing and Strengthening Patent Assets Using Various Patent Office Procedures

Having a patent portfolio provides many opportunities for in-house counsel; however, most companies simply maintain their patent portfolios without particular emphasis on the quality or potential use of those patents. A patent portfolio should be strengthened and intensified in order to maximize a return on this investment.

- Understand the importance of an optimized patent portfolio
- Learn how to leverage Patent Office procedures to maximize effectiveness and efficiency
- Discuss the how to address potential issues in pending applications and issued patents



Eric Sopher
Partner
DENTONS



Kirupa Pushparaj
Director, Intellectual Property
SQUARE



Grant Moss
President
ADAPT IP VENTURES

12:30

Luncheon

1:30

Identify Opportunities for Partnering with FinTech Companies

Every year, FinTech startups produce new and exciting technology, from mobile payments and money transfers to loan shopping. For traditional financial institutions, the question is whether to purchase the underlying IP or the entire company. In this session, explore the advantages and risks to partnering with or acquiring FinTech companies.

- Determine whether to partner with or acquire a FinTech startup
- Evaluate the risks and opportunities of engaging with FinTech companies
- Discuss strategies and best practices for courting a FinTech company



Edward Kelly
Partner
ROPES & GRAY LLP



Regina Pentt
Counsel
ROPES & GRAY LLP



Ziad Katul
Senior Counsel
BANK OF
MONTREAL



Melissa Fisher
Executive Director and
Associate General Counsel,
Intellectual Property and Data
THE DEPOSITORY TRUST &
CLEARING CORPORATION
(DTCC)

DAY TWO – THURSDAY, JULY 26, 2018

2:20 Explore the Changing Privacy Landscape and its Impact on the Financial Services Industry

Privacy and cybersecurity issues are on the rise. With the implementation of the GDPR, the impending the ePrivacy Regulation, and the development of California's new privacy law, in-house counsel of companies from each industry need to be prepared the changing data ecosystem. During this session, examine the fastest growing area of law.

- Assess the implementation of the GDPR
- Prepare for the ePrivacy Regulation
- Discuss California's new privacy law
- Understand privacy risks and liabilities on the federal level



Carol Anne Been
Partner
DENTONS



Phyllis Turner-Brim
Vice President, Assistant
General Counsel IP
and Technology
STARBUCKS



Brock Wanless
Managing Counsel - Global
Privacy & Regulatory
GROUPON



Alfredo Della Monica
VP & Senior Counsel –
Global Privacy Team
AMERICAN EXPRESS

3:10 Predict the Future of Cryptocurrencies

With ICOs gaining popularity and Bitcoin's volatile movements, cryptocurrencies offer many opportunities and also many risks. As these new currencies gain mainstream momentum, in-house counsel must be prepared to tackle a new set issues. During this session, discuss the legal issues affecting in-house counsel in regards to cryptocurrencies.

- Examine the future regulatory landscape
- Address anti-money laundering concerns
- Discover the ethical implications of cryptocurrencies



CHARLES R. MACEDO
Partner
**AMSTER, ROTHSTEIN &
EBENSTEIN, LLP**



Sophia Lee
General Counsel
IEX GROUP, INC.



Tomy Shen
Data Scientist
BLOOMBERG



Robert Kim
Legal Editor
BLOOMBERG

4:00 Close of Summit

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SILVER PARTNERS:

大成 DENTONS

Dentons' patent team has been prosecuting patent applications and resolving controversial matters in the financial services industry for years. Dentons has more than 80 IP lawyers in more than 20 US offices, many of whom have experience in patent prosecution, patent litigation, post-grant challenges, opinions, licensing transfers, technology transfers and corporate due diligence involving financial services innovations.

FISH
FISH & RICHARDSON

Fish & Richardson is a global intellectual property law firm offering patent, trademark and copyright prosecution and counseling, intellectual property litigation, and commercial litigation services. The firm has more than 400 attorneys and technology specialists in the U.S. and Europe. Our success is rooted in our creative and inclusive culture, which values the diversity of people, experiences, and perspectives. Fish is the No. 1 U.S. patent litigation firm, handling nearly three times as many cases as its nearest competitor; a powerhouse patent and trademark prosecution firm; a top-tier trademark and copyright litigation firm; and the No. 1 firm at the Patent Trial and Appeal Board, with more cases than any other firm. Since 1878, Fish attorneys have been winning cases worth billions in controversy – often by making new law – for the world's most innovative and influential technology leaders. For more information, visit <https://www.fr.com> or follow us at @FishRichardson.

FRIED FRANK

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MAYNARD
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Microsoft

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EXECUTIVE PARTNERS:

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Intellectual Property Law

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CC

Cantor Colburn LLP
Intellectual Property Attorneys

Cantor Colburn, one of the largest full-service IP law firms in the country, is the fastest growing U.S. patent firm over the last ten years, and is ranked #4 for design patents, #6 for utility patents and #10 for trademarks (Juristat, IP Watchdog, Ant-like Persistence). The firm's Litigation Department has also received national recognition. More than 100 attorneys and agents provide counsel to clients worldwide from offices in Hartford, Washington, D.C., Atlanta, Houston, and Detroit

CONDO
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CRK

Condo Roccia Koptiw LLP ("CRK") has one of Philadelphia's largest intellectual property practice groups. CRK was founded on the belief that old law firm models are outdated. By reinventing the traditional law firm model, CRK empowers attorneys to leverage a tech-forward approach to create value for our clients. We focus our skillsets on patent prosecution and patent litigation, and our efforts towards your business goals.

DH
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G

GOODWIN

Goodwin has approximately 1000 lawyers in 10 offices across the globe with a diverse practice mix including intellectual property, litigation, private equity, and real estate.

ROPES & GRAY

Science, technology and business leaders turn to Ropes & Gray to handle their critical intellectual property litigation matters. Our experienced team of attorneys has in-depth knowledge of patent challenge and defense, and all other areas of intellectual property applicable to the financial services industry, including innovative financial products, payment and money transfer technologies, electronic and Internet-based trading systems, proprietary financial modeling and FinTech innovation such as "robo-advisers", marketplace lending, mobile platforms, crypto-currencies and blockchain. Our IP practice is comprised of a leading group of IP specialists that are ranked globally by Chambers, U.S. News & World Report –Best Lawyers, Financial Times, IAM Patent 1000 Guide, Benchmark Litigation and Managing IP. Our global team comprises over 125 lawyers and patent agents/technical advisors across the United States, Asia and London. Additionally, Ropes & Gray is the country's preeminent law firm representing companies before the Patent Trial and Appeal Board (PTAB) in both covered business method (CBM) patent reviews and inter partes reviews (IPR) proceedings and section 337 cases before the International Trade Commission (ITC).

EXHIBITOR:

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RATIONAL PATENT™

RPX Corporation (NASDAQ: RPXC) is the leading provider of patent risk and discovery management solutions. Since its founding in 2008, RPX has introduced efficiency to the patent market by providing a rational alternative to litigation. The San Francisco-based company's pioneering approach combines principal capital, deep patent expertise, and client contributions to generate enhanced patent buying power. By acquiring patents and patent rights, RPX helps to mitigate and manage patent risk for its growing client network.

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IP

Adapt IP develops and manages IP divestitures, licensing, acquisition and valuation programs to support business expansion, risk mitigation and value creation opportunities.

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PATENT INSURANCE

IPISC's Intellectual Property Insurance can help pay legal fees and damages resulting from infringement lawsuits and can even be used as collateral for business funding.

LOTNETWORK

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