

IP Recordal & Legalisation Service for Law Firms

For more information about CPA Global and our IP Portfolio Management Services, please go to www.cpaglobal.com or contact ipinfo@cpaglobal.com.

Your client's IP portfolio is a significant organisational asset and like other assets, can change hands as a result of mergers, acquisitions or other organisational changes. With these activities comes the need to assign and update ownership information to ensure the long-term enforceability of your client's valuable IP. This is a highly complex administrative task that varies from one jurisdiction to another. Not only can ownership details be incorrect on the Register, but complying with the specific country formalities and laws is cumbersome and time-consuming.

CPA Global, in coordination with client's legal counsel, offers a cost effective and efficient process for managing the administrative elements of patent and trademark recordal work – global recordal of assignment, merger and change of name and/or address. Through our systematic project management based approach and an extensive global agent network, CPA Global delivers a comprehensive and customisable IP recordal service for projects of all sizes and scope. CPA Global can manage the entire process from document preparation through proofreading of recordal certificates. There's a reason 40,000 customers depend on CPA Global to optimise their business and deliver value.

Services

CPA Global's IP Recordal and Legalisation Service combine a disciplined project management approach with 37 years of extensive IP experience to deliver:

- **Comprehensive Cost Projections** – Cost quotes inclusive of official, service and legalisation fees.
- **Project Management** – Start to finish, including document preparation, Legalisation, foreign agent and PTO instruction; confirmation of recordal/filings; handling of any post instruction queries from foreign agents and proofing certificates of recordal for accuracy.
- **Formality Management** – Reporting and assisting with all formal documents required to make recordal on a jurisdictional basis.
- **Confirmatory Short Form Deed Preparation** – Provision of ready-to-sign, country specific deeds that conform to local law requirements. Local translations are included, saving your client additional translation costs.
- **Power Of Attorney Service** – Option to have CPA Global execute all requisite POA documents in support of the project.
- **Legalisation** – POA documents, assignments and other evidentiary documentation supporting recordal; retrieval of merger and change of name certificates.
- **Verification** – Last listed owner and other case information as needed.

Benefits:

CPA Global has made significant investments in state-of-the-art operations and retaining high-calibre resources to cost effectively extend the capabilities of your firm while maintaining the quality and security you and your clients expect. Other benefits of selecting CPA Global and its IP Recordal and Legalisation Service include:

- **Speed** – IP Recordal projects are executed on a specified time frame with identified milestones to gauge progress – the average project is completed in approximately 6 months. Our project team is dedicated to completing the project in a timely manner and is able to avoid being side-tracked by other issues.
- **Cost Certainty** – Prior to the commencement of the project, CPA Global provides a fixed price quote so all costs can be properly budgeted and allocated.
- **Cost Savings** – Firms are under increasing pressure to save clients money. By leveraging CPA Global's buying power with foreign agents, you are able to benefit from competitive agent rates.
- **Cash Flow Management** – Instead of handling foreign agent invoices and fronting the project costs, CPA Global will contract and invoice your client directly at the start of the project. Your firm remains the primary project point of contact and can maintain the client relationship.
- **Single Point of Contact** – A dedicated CPA Global project manager will be your single point of contact for all jurisdictions versus multiple foreign agents.
- **Engagement Options** – CPA Global can offer different engagement options with you and your client during the life of the project. We can work directly with you or your client as well as handle other customised engagement requests.

- **CPA Global Expertise** – CPA Global has been handling this type of work for nearly 40 years and maintains a knowledge base of ever-changing documentary and legal requirements across all jurisdictions. As the world's largest annuity payer, and entrusted with the largest, collective IP portfolio in the world, we are vigilant in our commitment to ongoing data integrity.
- **Worldwide Agent Relationships** – Many law firms do not have relationships with agents globally, whereas CPA Global has affiliations in place for all countries. We have built up excellent relationships with our agents over many years, and due to the volumes filed we can pass on the benefits of buying power and tight service level agreements.

Issues to Consider

- **Utilising Existing Internal Resources** – When firms complete recordal work on behalf of their clients, it can be a huge administrative burden. Unanticipated delays in the project may result due to a lack of dedicated resources and the costs may not be predictable.
- **Hiring Temporary Resources** – If temporary personnel are brought in to complete the project, then invariably they will lack knowledge of the complex formality processes. This requires extensive training, not often achieved in a short timeframe. There can also be quality and continuity issues as temporary staff come in and out of projects.