



IP Recordal & Legalization Service for Corporations

Maintaining the integrity of your IP ownership information



Your company's IP portfolio represents a significant organizational asset and like other assets, can change hands as a result of mergers, acquisitions or other organizational changes. With these activities comes the need to assign and update ownership information to ensure the long-term enforceability of your 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 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 our extensive global agent network, CPA delivers a comprehensive and customizable IP recordal service for projects of all sizes and scope. CPA can manage the entire process from document preparation through proofreading of recordal certificates. Because we are able to leverage our foreign agent buying power, your company will benefit from CPA's highly competitive rates. There's a reason 40,000 clients depend on CPA to optimize their business and deliver value.

SERVICES:

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

- **Comprehensive Cost Projections** – Cost quotes inclusive of agent, official, service and legalization fees.
- **Project Management** – Start to finish, inclusive of document preparation, legalization, foreign agent and PTO instruction; confirmation of recordal/filings; handling 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 you additional translation costs.
- **Power Of Attorney Service** – Option to have CPA execute all requisite POA documents in support of the project.
- **Legalization** – 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 has made significant investments in state-of-the-art operations and retaining high-calibre resources to cost effectively extend the capabilities of your company while maintaining the quality and security you expect. Other benefits of selecting CPA and its IP Recordal and Legalization 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 as is often the case in the corporate environment.

- **Cost Certainty** – Prior to the commencement of the project, CPA provides a fixed price quote so all costs can be properly budgeted and allocated.
- **Cost Savings** – By leveraging CPA's buying power with its foreign agents, we pass on highly competitive agent rates. Further, CPA has agent service level agreements in place that allow clear understanding of responsibilities which has fostered excellent relationships between CPA and its agent network.
- **Single Point of Contact** – A dedicated CPA project manager will be your single point of contact for all jurisdictions versus multiple foreign agents.
- **CPA Expertise** – CPA 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.

ISSUES TO CONSIDER:

For corporations considering using existing or temporary staff, outside counsel, or even deciding not to make record changes, they should think about the following:

- **Internal Resources** – When corporate legal departments complete recordal work themselves, there is often a drain on internal resources, unanticipated delays in the project, and a lack of dedicated focus.
- **Outside Counsel** – When a corporation retains a law firm to perform this work on its behalf, the project is often extremely costly, as the firm will most likely charge an hourly rate, may have little buying power with foreign agents and may not have experience with the local formalities in each jurisdiction. Lack of country knowledge can impact efficiency and increase costs.
- **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.

For more information or to request a quote:

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