SUMMARY: Don’t miss the 2017 Intellectual Property Institute for Paralegals! This annual IP multitrack program covers many relevant topics for IP paralegals and administrators of all experience levels working with patents and/or trademarks and meets North Carolina State Bar Board of Paralegal Certification requirements for recertification. The schedule includes an international IP session, practice area-specific breakout sessions as well as ethics and technology updates. Returning this year are additional breakout sessions on IP Basics.

The lineup for 2017 includes:
• Brexit update and its effect on the international IP world
• Breakout sessions on patents, trademarks and IP basics
• Policing and protecting trademarks
• Domains and Generic top-level domains (gTLDs) as part of an IP portfolio
• Patent law and litigation update including e-discovery hot topics
• The future of legal ethics
• Technology resources for the IP paralegal

The North Carolina Bar Association Foundation is accredited by the North Carolina State Bar as a provider of continuing legal education.
2017 IP Institute for Paralegals
#621IPP and #621LWC | April 27, 2017

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VIDEO REPLAY LOCATIONS | For details and updates, see www.tinyurl.com/CLE621IPP.

☐ Cary | #621BAR | August 17
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Thursday, April 27, 2017, 8:30a–4:15p

8:30a  **Registration and Continental Breakfast**  
Breakfast sponsored by Patent Designs

8:55  **Welcome and Introductions**

9:00  **Brexit and Impact on IP**  
**Robert McDougall** and **Azhar Sadique**  
A discussion of how Brexit could potentially affect the international trademark and patent registration process and its impact on protection of intellectual property.

10:00  **Breakout Sessions** (Please choose one)

•  **PATENT | Three Hot Topics in E-Discovery**  
  **Mary K. “Katie” King** and **Clara Skorstad**  
  This session discusses three aspects of e-discovery that IP paralegals are sure to encounter, if they have not already:
  •  The importance of ESI planning and cooperation in complying with relevant rules and meeting ethical obligations
  •  Using technology to help manage the e-discovery process and reduce the costs associated with e-discovery
  •  Data privacy and cross-border concerns when data is created or stored outside the United States

•  **TRADEMARK | Tips for Policing and Protecting Your Trademarks**  
  **Kimberly B. Gatling**  
  Trademarks are valuable business assets. Learn tips regarding how to preliminarily search availability of new trademarks, obtain trademark registration, protect against internal misuse of trademarks, look for trademark infringement in the marketplace and enforce trademark rights.

•  **IP BASICS | The Killer Specimen: Tips for Keeping the Application and Registration “Live”**  
  **Zaneta M. Robinson**  
  Often perceived as the simplest aspect of an application, a specimen selected to show use of a mark in commerce can wreak havoc on an application or a post registration statement of use. This session discusses the key elements for identifying a suitable specimen and avoiding various pitfalls before sharing your evidence with the USPTO.

11:00  **Break**

11:15  **Breakout Sessions** (Please choose one)

•  **PATENT | Patent Litigation in District Court and the PTAB**  
  **Andrew W. “Andy” Rinehart**  
  An overview of the current state of patent litigation in U.S. District Courts and before the Patent Trial and Appeal Board. Recent data is presented regarding patent litigation statistics and trends, key case law developments, and practice points for those involved in preparing and filing litigation documents.
• TRADEMARK | Trademark Owner’s Guide to Building a Domain Portfolio
Sofia M. Hernandez and Jacob R. “Jake” Sullivan
This session covers the continued roll-out of International Corporation for Assigned Names and Numbers (ICANN’s) new gTLDs along with specific challenges that face trademark owners in building and maintaining a comprehensive domain portfolio including updates and developments stemming from the “handover of the Internet.”

• IP BASICS | Patent Basics—What You Should Know to Impress Your Friends
N. Dean Powell Jr.
Most people have a general understanding of what a patent is, but do they know the ins and outs of a patent? The process to obtain a patent? The term of a patent and what a patent owner can do with a patent? This program answers these questions and discusses all things patents—from preparation and filing to examination to issuing and maintenance.

12:15p Networking Lunch (included at Live program only)

1:00 Breakout Sessions (Please choose one)
• PATENT | Patent Law Updates
Rebecca L. Hammond
Get updated on recent court decisions and legislative reforms and discuss their effects on patent practitioners as well as potential effects of the new presidency on patent law.

• TRADEMARK | Managing a Large Trademark Portfolio
William B. “Will” Cannon
Best practices and guidance on effectively managing a large trademark portfolio consisting of multiple registrations and how to provide the essential IP legal support to your client.

2:00 Break

2:15 The Future of Law (Ethics)*
Camille Stell
This session focuses on how the work environment is changing and the roles employees play in facilitating that change, including how to be a change agent, how to reward new ideas, how professions in general are changing and how to stay current on the ethics rule with regard to technology.

3:15 Technology Session
Joyce P. Brafford
This session digs deeper into the subject of technology and how paralegals can utilize this tool to maximize their legal support performance.

4:15 Adjourn

* Indicates portion providing Ethics/Professional Responsibility credit

We extend our sincere gratitude to the Paralegal Division and the planners and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.
Program Information

Planners
- Stephanie C. Minor, Office of Counsel, Duke University, Durham
- Melissa C. Saunders, Cree Inc., Durham
- Toyce E. Southern, Kilpatrick Townsend & Stockton LLP, Winston-Salem

Speakers
- Joyce P. Braggord, North Carolina Bar Association, Cary
- William B. "Will" Cannon, Parker Poe Adams & Bernstein LLP, Raleigh
- Kimberly B. Gatling, Smith Moore Leatherwood LLP, Greensboro
- Rebecca L. Hammond, Ph.D., Williams Mullen, Raleigh
- Sofia M. Hernandez, Olive & Olive PA, Durham
- Mary K. "Katie" King, Kilpatrick Townsend & Stockton LLP, Winston-Salem
- Robert McDougall, Keltie LLP, London
- N. Dean Powell Jr., Kilpatrick Townsend & Stockton LLP, Winston-Salem
- Andrew W. “Andy” Rinehart, Kilpatrick Townsend & Stockton LLP, Winston-Salem
- Zaneta M. Robinson, Kilpatrick Townsend & Stockton LLP, Winston-Salem
- Azhar Sadique, Keltie LLP, London
- Clara Skorstad, Kilpatrick Townsend & Stockton LLP, Winston-Salem
- Camille Stell, Lawyers Mutual Liability Insurance Company of North Carolina, Cary
- Jacob R. “Jake” Sullivan, Olive & Olive PA, Durham

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Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

- Embassy Suites, 201 Harrison Oaks Boulevard, Cary
  Rate: $169 Single/Double. Rate includes a full cooked-to-order breakfast and the manager's evening reception.
  Reservations: 919.677.1840 | Reference Corporate ID: NCB or NC Bar Rate

- TownePlace Suites by Marriott, 120 Sage Commons Way, Cary
  Rate: $114 studio queen with sleeper sofa (Sunday–Thursday). Rate includes a complimentary hot breakfast. All rooms come with a fully equipped kitchen.
  Reservations: 919.678.0005 | Ask for the NC Bar Association corporate rate.

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2017 IP Institute for Paralegals

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Thursday, April 27, 2017
NC Bar Center, Cary

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UPDATES & REGISTRATION
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“[This program provided] a great deal of information that will benefit the practice that I work in.”

“I am new to trademark law and found this clarified a lot for me and gave me a starting point for research.”

—Attendees of the 2016 IP Institute for Paralegals