FoundationIP

CPA GLOBAL®

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FoundationIP

Your scalable, seamless, state-of-the-art solution

By combining IP expertise with IT innovation, CPA Global has established itself as a technology leader in IP management. We've analyzed the way law firms and corporate IP departments work, and developed an intelligent platform that has transformed the way organizations manage their IP, allowing them to reduce cost, mitigate risk, facilitate collaboration, and improve efficiencies.

FoundationIP makes IP management easy. As a hosted solution, it removes the need for an extensive IT infrastructure, which makes it quick to set up and simple to use. By harnessing the power of the web, this state-of-the-art, scalable hub lets you manage your IP portfolio seamlessly, from wherever you are, at any time. It stores all IP matters, including patents, trademarks, designs, licenses and oppositions, with associated documents and emails, in one centralized database. This means that you, your colleagues and your clients, partners and customers can log in, share information and collaborate immediately.

"FoundationIP IS AN OPTIMUM INVESTMENT FOR A SMALLER ORGANIZATION WITH AN EMERGING PORTFOLIO. THE FLEXIBLE PRICING AND THE SCALABILITY PROVIDE FOR QUICK IMPLEMENTATION OF A POWERFUL BUSINESS TOOL."
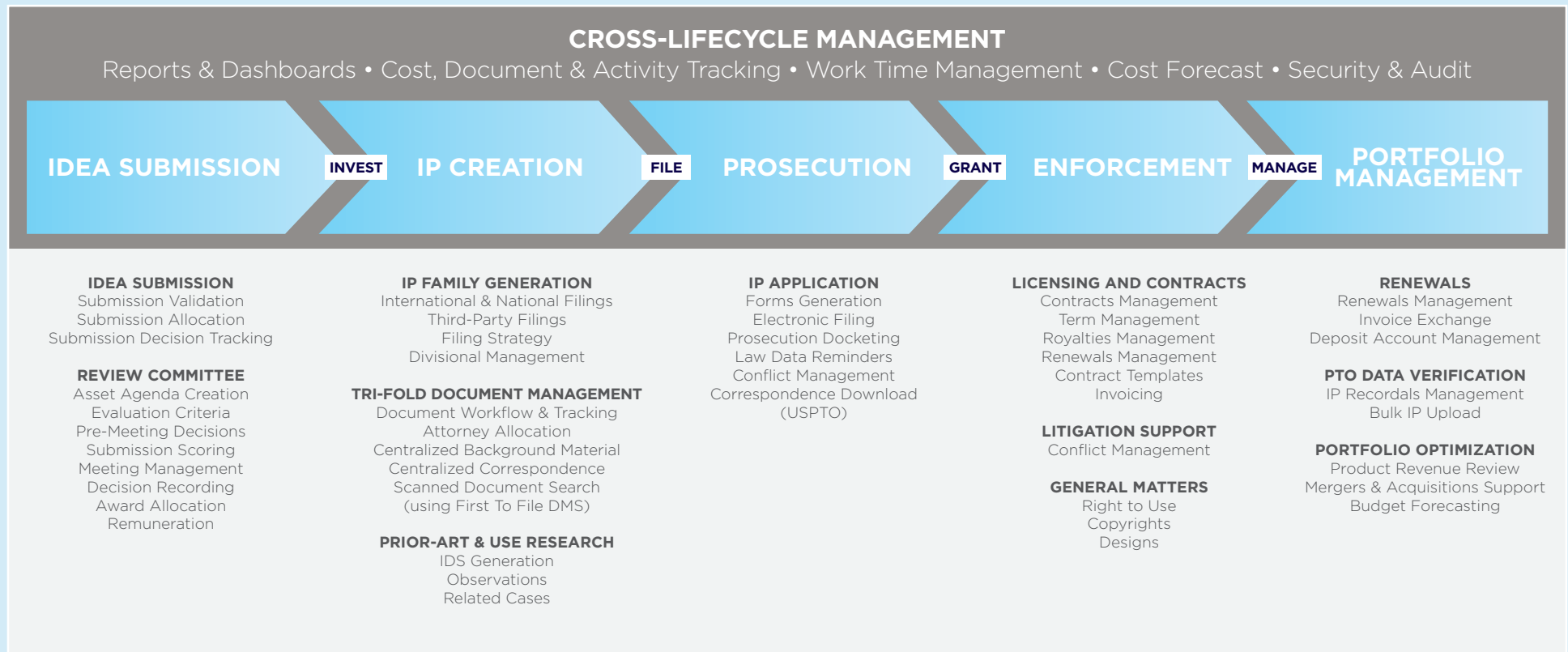
— DR. MICHAEL PAUL, DIRECTOR IP, LINEAGEN INC.

FUNCTIONALITY

TOTAL CONTROL OF YOUR IP LIFECYCLE

FoundationIP delivers comprehensive functionality to manage all aspects of the IP lifecycle from idea submission to commercial management. It covers all types of intellectual assets including patents, trademarks, designs, domains and commercial contracts.

FoundationIP MANAGES ALL ASPECTS OF THE IP LIFECYCLE

CROSS-LIFECYCLE MANAGEMENT
Reports & Dashboards • Cost, Document & Activity Tracking • Work Time Management • Cost Forecast • Security & Audit

IDEA SUBMISSION → INVEST → **IP CREATION** → FILE → **PROSECUTION** → GRANT → **ENFORCEMENT** → MANAGE → **PORTFOLIO MANAGEMENT**

IDEA SUBMISSION	IP FAMILY GENERATION	IP APPLICATION	LICENSING AND CONTRACTS	RENEWALS
IDEA SUBMISSION	**IP FAMILY GENERATION**	**IP APPLICATION**	**LICENSING AND CONTRACTS**	**RENEWALS**
Submission Validation	International & National Filings	Forms Generation	Contracts Management	Renewals Management
Submission Allocation	Third-Party Filings	Electronic Filing	Term Management	Invoice Exchange
Submission Decision Tracking	Filing Strategy	Prosecution Docketing	Royalties Management	Deposit Account Management
	Divisional Management	Law Data Reminders	Renewals Management	
REVIEW COMMITTEE		Conflict Management	Contract Templates	**PTO DATA VERIFICATION**
Asset Agenda Creation	**TRI-FOLD DOCUMENT MANAGEMENT**	Correspondence Download	Invoicing	IP Recordals Management
Evaluation Criteria	Document Workflow & Tracking	(USPTO)		Bulk IP Upload
Pre-Meeting Decisions	Attorney Allocation		**LITIGATION SUPPORT**	
Submission Scoring	Centralized Background Material		Conflict Management	**PORTFOLIO OPTIMIZATION**
Meeting Management	Centralized Correspondence			Product Revenue Review
Decision Recording	Scanned Document Search		**GENERAL MATTERS**	Mergers & Acquisitions Support
Award Allocation	(using First To File DMS)		Right to Use	Budget Forecasting
Remuneration			Copyrights	
	PRIOR-ART & USE RESEARCH		Designs	
	IDS Generation			
	Observations			
	Related Cases			

A HOST OF ADVANTAGES

FoundationIP delivers a comprehensive set of benefits to help you maximize your IP portfolio.

REDUCED COSTS

Because FoundationIP is hosted, it does not require a large up-front investment in infrastructure, licenses and maintenance costs. There's no need to accommodate servers, no need to hire IT support, and no upgrades or installations to manage and pay for. And because you pay just one monthly fee based on the number of IP matters you manage in the system, FoundationIP can help reduce your day-to-day operating costs and simplify the budgeting process.

LESS RISK

By storing your IP data in one secure, centralized system, you minimize the risk of inaccurate data entry while transferring information between systems. You also remove the need to make multiple copies of data files and can avoid storing sensitive customer data on employees' desktops or laptops.

The system calculates deadlines automatically based on applicable country laws, compiled by a team of over 20 attorneys and IP software specialists across the United States, Europe and India, working with over 1,000 agents worldwide, providing you with timely information essential to prosecution and maintenance of your IP portfolio. FoundationIP is regularly updated as country laws change.

> "THE FoundationIP PLATFORM COMPLEMENTS OUR NEW BUSINESS STRATEGY PERFECTLY. ENTRUSTING CPA GLOBAL WITH THE TECHNOLOGY-SUPERVISION PIECE MEANS WE CAN SPEND THE TIME WE'VE SAVED FOCUSING ON PORTFOLIOS AND BETTER SERVING OUR CLIENTS."
>
> — VINCENT ROCCIA, FOUNDING PARTNER, CONDO ROCCIA
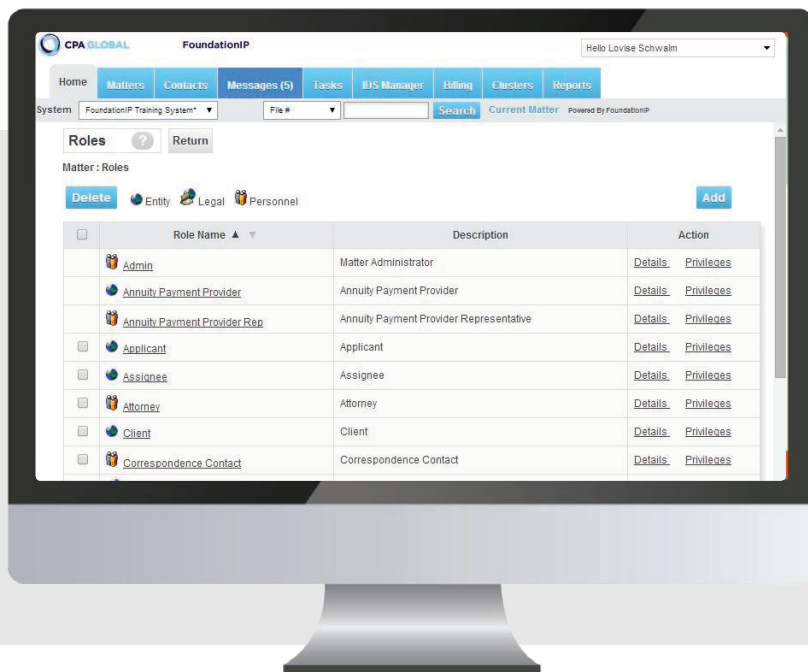
GREATER COLLABORATION

Because FoundationIP is a centralized hub of information, it provides a platform for effective communication between internal and external stakeholders. The web-based platform gives authorized users 24/7 access to the system. They can manage their portfolios through FoundationIP to view status, execute tasks or run reports as needed.
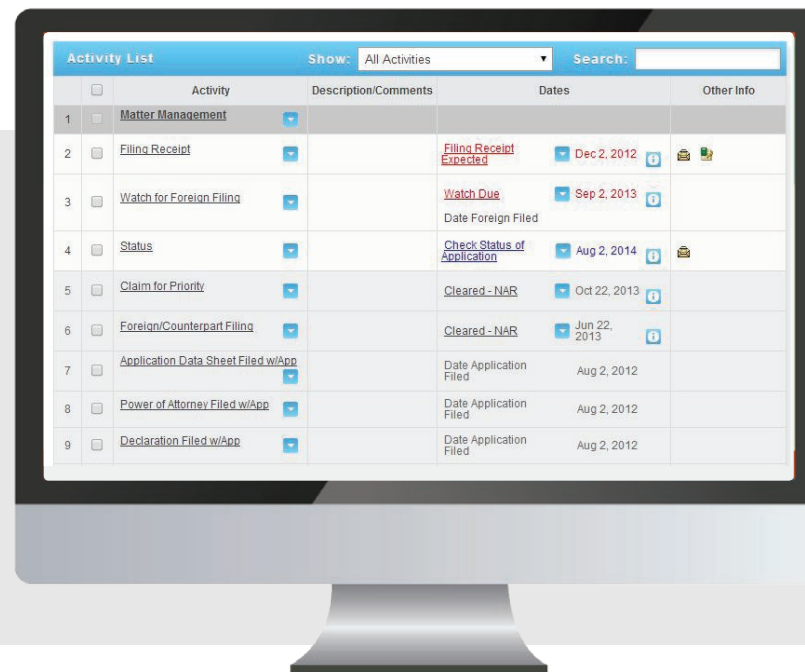
IMPROVED EFFICIENCY

FoundationIP frees you and your team to focus on higher-value work. IP professionals are cutting as much as half of their busy work with FoundationIP's ability to automate reports, calculate due dates, capture invention disclosures and issue awards, allow references to flow between related matters, import references and more.

LEVERAGING FLEXIBILITY

FoundationIP is designed to be highly flexible, allowing corporations to maximize their IP portfolios and law firms to deliver a reliable and efficient service to their clients.

"FoundationIP ENABLES US TO STAY TRUE TO OUR CORPORATE ETHOS OF ALIGNING OUR FINANCIAL INTERESTS WITH THOSE OF OUR CLIENTS."

— **JEFF KUESTER,** CHAIRMAN, TAYLOR ENGLISH PATENT PRACTICE

LAW FIRMS

FoundationIP helps law firms strategically manage IP portfolios, resulting in greater efficiency, reduced risk and enhanced client satisfaction and retention.

Provides greater efficiencies through gains from core docketing and automated prior art loading

Allows sharing of portfolio information to enhance client service

Secure, cloud-based IP management for small to medium-size firms that streamlines administration and facilitates collaboration

Assures improved accuracy and reduced risk driven by strong IP prosecution laws, automatic family data and prior art propagation

Integrates with renewals service to streamline process, mitigate risk and ensure accuracy

CORPORATIONS

FoundationIP helps businesses strategically manage their IP portfolio for maximum value.

Fosters value realization of a global IP portfolio

Enables the exchange of IP portfolio information to help stakeholders make the best strategic decisions regarding the portfolio

Provides access to a central IP database integrated with other corporate applications, e.g., HR, accounting, document management systems

Helps businesses efficiently manage their IP portfolio through the prosecution and maintenance processes

Secure, cloud-based IP management, easy to use and administer

FoundationIP is at the very heart of your IP management.

CORPORATIONS

INTERNAL USERS
IP Business Manager • Marketing Manager
Records Manager • Regional Offices
In-house Attorney • Paralegal/Docketer • Inventor

EXTERNAL USERS
IP Business Partner • Outside Counsel

LINKS TO OUTSOURCED PROVIDERS
IP Support Services • Annuities • Paralegal
Docketing • Searching • Watching

FoundationIP

LAW FIRMS

INTERNAL USERS
Attorney • Lawyer • Records Manager
Paralegal • Docketer

EXTERNAL USERS
Foreign Agent • Freelance Attorney • Client

LINKS TO OUTSOURCED PROVIDERS
IP Support Services • Annuities • Paralegal
Docketing • Searching • Watching

HIGHEST LEVEL OF SECURITY

We know that security is crucial — and we have made it a top priority. FoundationIP delivers industry-leading protection for your company's data. The FoundationIP data center is certified to SSAE 16 SOC1 (Trust Services Principles), and the FoundationIP data center, development, operations and support are all certified to the ISO 27001 information security standard.

PHYSICAL & ENVIRONMENTAL SECURITY

Our hardware facility provides:

- Controlled access managed by 24-hour security staff
- Data center temperature and humidity control
- Fire detection (heat and smoke detectors) and fire suppression
- Redundant electrical generators and air conditioners
- Video camera monitoring and recording (inside and outside the facility)
- Real-time failover to backup server systems for continuous operations

NETWORK PERIMETER PROTECTION

The network perimeter is protected by redundant high-availability firewalls, working alongside a network-based Intrusion Detection System. In addition, we have quarterly internal security audits, as well as an annual full vulnerability and penetration test conducted by a specialist third-party company.

BUSINESS CONTINUITY

FoundationIP includes multiple levels of security to assure continuity of IP operations even in the event of catastrophic failure. Offsite data storage and disaster recovery will restore normal operation within 24 hours. All automated failover systems are tested annually. All your data is backed up to a secure software vault located at a secondary hosting center, and data is retained for up to a year. Database transaction data is backed up hourly, and system audit logs are kept indefinitely.

DATA ENCRYPTION

FoundationIP uses robust encryption products to protect your data and communications, including 128-bit Trustwave Secured Socket Layer (SSL) Certification.

DATA SECURITY

All data remains your property. Administrative access to the hardware and software environment is restricted to FoundationIP operations staff and hosting center staff, who perform system management, maintenance, monitoring, and backup functions, using approved equipment and processes.

USER AUTHENTICATION

Individuals can only access FoundationIP by using a valid username and password. Login details are encrypted via SSL during transmission, and password strength criteria are automatically enforced.
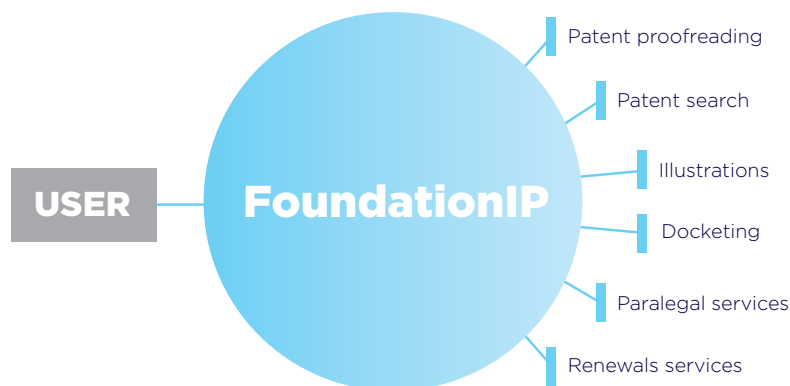
APPLICATION SECURITY

Define your user access privileges based on your existing internal security structure. Built-in application security components ensure that export control and outside counsel access rights are strictly enforced, and our hardened operating system minimizes security risks.

SEAMLESS ACCESS TO A WORLD OF SERVICES

Both IP practices and corporate IP departments are under pressure to increase IP portfolio value and improve efficiencies. FoundationIP is your access to a host of other IP portfolio management services provided by CPA Global.

USER — **FoundationIP**

- Patent proofreading
- Patent search
- Illustrations
- Docketing
- Paralegal services
- Renewals services

"FoundationIP ALLOWS US TO CREATE REPORTS ON OUR HOLDINGS THAT WE CAN THEN SHARE DURING WEB CONFERENCES WITH DEDICATED MANAGERS THROUGHOUT OUR ENTIRE CORPORATE STRUCTURE, FROM R&D TO MANUFACTURING TO SALES."

— **MATHIAS CORBOZ,** PATENT MANAGER, HID GLOBAL

RENEWALS MANAGEMENT

The renewals manager interface means decisions such as pay, abandon and other instructions can be made from within your FoundationIP system. Because data is coming directly from your docketing system, you have greater control, efficiency and accuracy. The renewals interface also means:
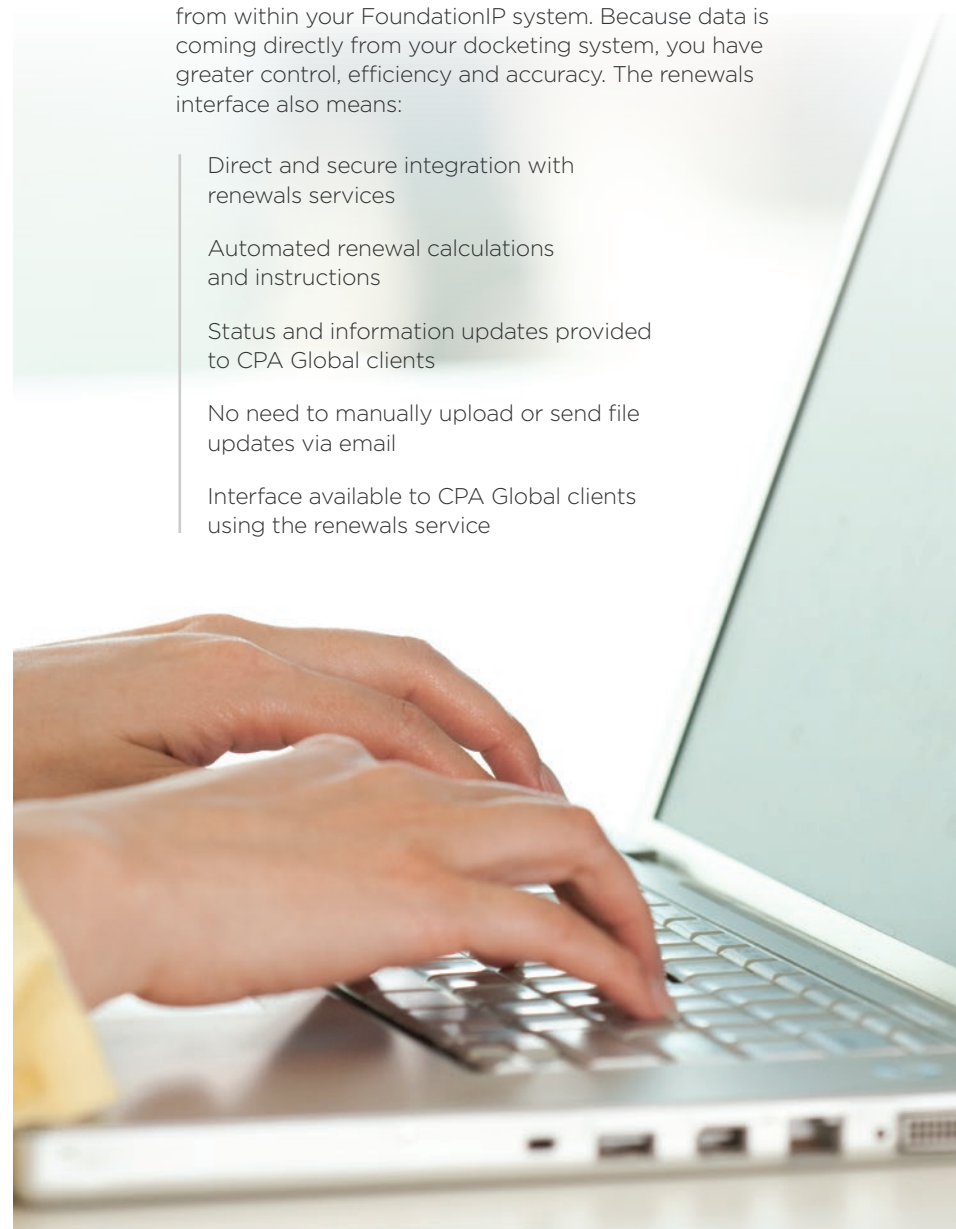
- Direct and secure integration with renewals services
- Automated renewal calculations and instructions
- Status and information updates provided to CPA Global clients
- No need to manually upload or send file updates via email
- Interface available to CPA Global clients using the renewals service

CPA GLOBAL®

The industry leader in IP management software

CPA Global is the world leader in IP management software. More than 25,000 IP professionals and over 1,000 companies and law firms rely on CPA Global software to manage their valuable IP rights, including patents, designs, trademarks, contracts and domain names.

With offices across Europe, the United States and Asia Pacific, CPA Global supports many of the world's best-known corporations and law firms with a range of IP management and broader legal services, helping them to manage risk, cost and capacity and realize greater value for their business and IP assets.

For more information about FoundationIP,
please contact your CPA Global representative
or visit **www.cpaglobal.com**

CPA Global
International Offices

Boise

Minneapolis

Arlington

Alexandria

San Mateo

Houston

Linköping

Stockholm

Malmö

London

Jersey

Frankfurt

Paris

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Seoul

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