RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2026 JUN 23 AM 11:42

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 144 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: *In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:*

Private Sponsor(s):
Colorado Bar Association

Travel Dates:
05/27/2026 to ~~05/30/2026~~ 5/29/2026

PP 6/22/2026

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$1,516.53	$398.00	$309.00	$0.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- **The final Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

6/22/2026
Date

Peter-Anthony Pappas
Printed Name of Traveler

Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

6/22/2026
Date

Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☑ Yes ○ No

Expense Change	Revised Amount	Explanation
Transportation	$1,516.53	The initial estimate of travel was based on airline flight and estimated seat assignment cost. Sponsor ended up covering additional seat assignment cost (18.99 additional each way), baggage fee (45.00 each way), and ground transportation from Denver International Airport to the conference hotel (259.75 total).

Were there any changes to the pre-approved itinerary?

○ Yes ☑ No

Explanation: There were no changes to the pre-approved itinerary.

Were there any additional changes to the pre-approved trip?

○ Yes ☑ No

Explanation: There were no additional changes to the pre-approved trip.

Pappas, Peter-Anthony (Judiciary-Rep)

From: Ben Skeen <bskeen@cobar.org>
Sent: Thursday, April 16, 2026 2:58 PM
To: Pappas, Peter-Anthony (Judiciary-Rep)
Cc: Kiley Chernicky; Mikaela Stone
Subject: Re: 24th Annual Rocky Mountain Intellectual Property and Technology Law Institute Invitation

Mr. Pappas,

Mikaela Stone wanted me to update the invitation below with additional information about the presentation. The format of the presentation will be a fireside chat; you will be joined on stage by Wayne Stacey, who will be facilitating a chat with you on the topic described below.

Sincerely,

Ben Skeen
He|Him|His
Program Attorney
CONTINUING LEGAL EDUCATION IN COLORADO, INC., dba CBA-CLE

1290 BROADWAY, STE. 1700
DENVER, CO 80203

303-824-5388 D | 303-860-0608 O
CLE.COBAR.ORG

CBA·CLE

From: Ben Skeen <bskeen@cobar.org>
Sent: Wednesday, April 8, 2026 2:48 PM
To: peter_pappas@judiciary-rep.senate.gov <peter_pappas@judiciary-rep.senate.gov>
Cc: Kiley Chernicky <kchernicky@cobar.org>
Subject: 24th Annual Rocky Mountain Intellectual Property and Technology Law Institute Invitation

Mr. Pappas,

My name is Ben Skeen, and I am a Program Attorney with CBA-CLE, the non-profit, educational arm of the Colorado and Denver Bar Associations- we met last year, when you spoke at the 23rd Annual Rocky Mountain Intellectual Property and Technology Law Institute.

I am writing to formally invite you to speak again at this year's institute. This year, we are inviting you to give a 50 minute solo address to our Patent track on Thursday, May 28, at 1:30 PM. In this slot, we would like you to address Legislative, Policy, and Agency change. We would be looking for your thoughts on how federal policy shifts affect IP and technology law; current agency priorities and enforcement trends; and how attorneys can strategically plan when policy and regulatory priorities shift between administrations.

All speakers receive complimentary registration for the Institute. In addition, we can potentially reimburse for your flight and one night at the conference hotel, to the extent that this is allowed by ethical rules.

Thank you for your contributions in the past, and we look forward to hearing from you this year. Please respond to me and Kiley Chernicky (Cc'd) with any questions.

Sincerely,

Ben Skeen
He|Him|His
Program Attorney
CONTINUING LEGAL EDUCATION IN COLORADO, INC., dba CBA-CLE

1290 BROADWAY, STE. 1700
DENVER, CO 80203

303-824-5388 D | 303-860-0608 O
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CBA·CLE

RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220.** Incomplete and late travel submissions will **not** be considered or approved.

Name of Traveler:
Peter-Anthony Pappas

Employing Office/Committee:
TILLIS, THOM

Private Sponsor(s):
Colorado Bar Association

Destination(s):
Westminster, Colorado

Travel Dates:
05/27/2026 to ~~05/30/2026~~ 5/29/2026

NOTE: If you plan to extend the trip for any reason you **must** notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

Peter-Anthony serves as the Director of Intellectual Property (IP) Policy for the U.S. Senate Committee on the Judiciary under Senator Thom Tillis – Chairman of the Subcommittee on IP – to whom he advises on all IP matters (e.g., patent, copyright, trade secret, trademark). Peter-Anthony has worked in the IP space for over 20 years.

Do you have an accompanying family member or spouse on this trip?
No

Name and Relationship to Traveler:
N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

4/16/2026
Date

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER
(President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain)

I Thom Tillis
(Print Senator's/Officer's Name)

hereby authorize Peter-Anthony Pappas
(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☐ (signify "yes" by checking box)

4/16/2026
Date

Thom Tillis
Signature of Supervising Senator/Officer

Colorado Bar Association: 2026 Rocky Mountain IP Institute

Peter-Anthony Pappas

Title:
Director of Intellectual Property Policy

Employing Office/Committee:
TILLIS, THOM

Duty Station:
WASHINGTON,DC

Destination(s):

Westminster, Colorado

Explain how this trip is specifically connected to the traveler's official or representational duties:

Peter-Anthony serves as the Director of Intellectual Property (IP) Policy for the U.S. Senate Committee on the Judiciary under Senator Thom Tillis – Chairman of the Subcommittee on IP – to whom he advises on all IP matters (e.g., patent, copyright, trade secret, trademark). Peter-Anthony has worked in the IP space for over 20 years.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Colorado Bar Association

Is your organization classified as a §501(c)(3)?
○ Yes ● No

§501(c)(3) Organization Type
N/A

Address
1290 Broadway, Suite 1700

Address 2 (Optional)

City, State Zip
Denver, Colorado 80203 United States

Phone Number
(720) 535-2317

Organization URL

History of Congressional Travel

The Institute occasionally invites congressional speakers to its annual conference. The most recent congressional travel request was submitted in 2025.

Educational Activities

The Institute provides an annual CLE conference that hosts 500+ attorneys, in-house counsel, and technology professionals. The Institute invites speakers to present CLEs through plenary sessions and four separate tracks on patent law, trademark and copyright law, licensing, and artificial intelligence.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyists.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☑ I certify that the sponsor is not a foreign government.
- ☑ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☑ I certify that the sponsor does not receive funding from a foreign government.

Comments

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

Mr. Pappas has been invited to speak at the 24th Annual Rocky Mountain IP Institute. He has been asked to speak on "Legislative Policy & Agency Change" on May 28th alongside Wayne Stacy, Director and Instructor for Berkeley Law. He has also been invited to participate in a moderated, invite-only group lunch on May 29th to discuss current intellectual property policy. Mr. Pappas has also been asked to attend a dinner honoring the faculty of the Institute on May 27th.

Explain how the purpose of the trip relates to your organization's mission.

The mission of CBA CLE is to educate, improve, and continually develop the professional competency and capabilities of all members of the legal profession and other interested parties by providing high quality continuing legal education. Mr. Pappas's participation would serve this mission by providing thought leadership on intellectual property law.

Is your organization the only sponsor for this trip?

- [x] Yes
- [ ] No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- [x] The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- [x] The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- [x] No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- [ ] The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- [ ] The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- [ ] The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Complete if any of the sponsors is not a §501(c)(3) organizations.

- [x] The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- [ ] The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- [ ] The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

- Travel expenses paid for will not include expenditures for recreational activities.
- Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

Members and staff from the House of Representatives **will not** receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
05/27/2026 @ 11:35 AM

Trip End Date/Time:
05/29/2026 @ 11:55 PM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

○ Yes ● No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: $1,128.80 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$1,128.80

Note
Roundtrip refundable airfare from IAD (Dulles) to DEN (Denver) airport.

Lodging (Per Member/Officer/Employee: $398.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
05/27/2026	05/29/2026	Westin Westminster	Westminster	Colorado	United States	2	$199.00	No

Meals (Per Member/Officer/Employee: $309.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
05/27/2026	$0.00	$0.00	$90.00	$0.00	**$90.00**	Denver	Colorado	United States	No
05/28/2026	$55.00	$49.00	$0.00	$0.00	**$104.00**	Littleton	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
These rates are established by the hotel hosting the conference event and are applied to every person attending the conference. They are determined as part of the event rental contract, which includes catering cost. It is not possible to negotiate these rate differently for any single person attending the conference.

05/29/2026	$55.00	$60.00	$0.00	$0.00	**$115.00**	Littleton	Colorado	United States	Yes

Cost Exceeds Per Diem Reason
(See explanation for 5/28 meal expenses.)

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $0.00)

Expense Type	Amount	Notes

There are no miscellaneous expenses.

Additional Attachments

Document Name

There are no additional attachments.

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: 2026 Rocky Mountain IP Institute

Travel Date(s): May 27-29, 2026

Travel Destination(s): Denver, Colorado

Sponsor: Colorado Bar Association - CLE

Mikaela Stone — *(printed name of sponsor representative)*

Planning Committee — *(title)*



(signature of sponsor representative)

April 7, 2026 — *(date)*

24th Annual Rocky Mountain IP & Technology Institute

Westminster, Colorado

May 28-29, 2026

Invitee List

Peter-Anthony Pappas, *Director of Intellectual Property Policy for the U.S. Senate Committee on the Judiciary*

2026 Rocky Mountain IP Institute Itinerary

Peter-Anthony Pappas

Wednesday, May 27, 2026

- Flight from Washington, D.C. to Denver Colorado
  - Flight # UA 1126 (IAD to DEN)
  - Departure: 2:35 PM
  - Arrival: 4:45 PM
- Transport from Denver International Airport to Westin, Westminster, Colorado
- Check-in at the conference hotel.
  - Location: The Westin Westminster, 10600 Westminster Blvd, Westminster, CO 80020
- 5:30 PM: Faculty Reception & Dinner
  - Location: Elway's Downtown, 1881 Curtis Street, Denver, CO 80202
  - All presenting members of the Institute's faculty are invited to a reception and dinner in their honor the night before the conference.

Thursday, May 28, 2026

- 7:45 AM – 5:15 PM: Conference is in session and Mr. Pappas is expected to attend plenary sessions and patent track sessions.
  - *Attendee may choose to shift to alternative conference sessions the day of the event. (*See* full conference agenda attached to the bottom of this itinerary.)
- 1:30-2:20 PM – Track A Breakout Session: Patents & Patent Litigation
  - **"Legislative, Policy, & Agency Change**
    - How federal policy shifts affect IP and tech law
    - Anticipating agency priorities and enforcement trends
    - Strategic planning amid regulatory uncertainty
  - ***Presented by Peter-Anthony Pappas, U.S. Senate Committee on the Judiciary, and Wayne Stacy, Berkeley Center for Law & Technology***

Friday, May 29, 2026

- 7:45 AM – 4:20 PM: Conference is in session and Mr. Pappas is expected to attend plenary sessions and patent track sessions.
    - *Attendee may choose to shift to alternative conference sessions the day of the event. (*See* full conference agenda attached to the bottom of this itinerary.)
- **11:55 AM – 1:10 PM –Sit-Down Lunch & Listening Session**
    - Explore how the generational shift in congressional leadership—combined with accelerating AI disruption—is reshaping U.S. intellectual property policy. With major patent reform bills, emerging Federal AI frameworks, and increasing agency activism, the next 5–10 years will redefine the balance between innovation, enforcement, and regulation. The conversation will focus on what this transition means for companies building long-term IP strategies in an era of legislative uncertainty and technological acceleration.
    - ***Presented by Peter-Anthony Pappas, U.S. Senate Judiciary Committee; moderated by Wayne Stacy, Berkeley Center for Law & Technology***
- Transport from The Westin Westminster to Denver International Airport
- Flight from Denver to Washington, D.C.
    - Flight # UA 2408 (DEN to IAD)
    - Departure: 6 PM
    - Arrival: 11:35 PM

2026 Rocky Mountain IP Institute

Conference Agenda

Day 1 - Thursday, May 28, 2026

7:45 – 9:00 am
Registration & Continental Breakfast
Sponsored by Kutak Rock

Continental Breakfast is included with your registration.

8:30 – 8:35 am
Welcoming Remarks
Extended by Nathaniel T. Trelease, Esq., Program Chair, WebCredenza, Inc.

8:35 – 9:50 am
Deep Tech: How Quantum Computing, Robotics, and Space are Changing Everything
Presented by Ben Bloom, Ph.D., Atom Computing; Jerry McIntyre, Esq., Orbit Fab; Shane Neman, Neman Ventures; and Sean Singleton, Ogelthorpe Capital, LLC
Moderated by Scott McKinney, Esq., Wilson Sonsini Goodrich & Rosati

9:50 – 10:05 am
Networking Break

10:05 – 10:55 am
Breakout Sessions

Track A: Patents & Patent Litigation
Patent Law Update
- Key judicial, legislative, and PTO developments shaping patent practice
- Practical implications for prosecution and litigation strategy
- What patent lawyers must adjust in 2026 and beyond
- Emerging trends in patent damages and remedies
Presented by Mark Lemley, Esq., Stanford Law School

Track B: Trademarks/Copyrights

The Age of Imitation: Dupes vs. Infringement

- Legal limits of "dupe" culture in trademarks and trade dress
- Enforcement strategies against look-alike products
- Brand protection lessons from recent disputes
- Social media's role in accelerating imitation culture and enforcement challenges

Presented by Amy Kramer, Esq., Greenberg Traurig, LLP; Kevin McPherson, Esq., Shein Distribution Corporation; and Chad T. Nitta, Esq., Kutak Rock LLP

Track C: Licensing

When the Cloud Turns Stormy: Navigating SaaS Contract Disputes

- Common failure points in SaaS agreements
- Litigation trends and dispute-resolution strategies
- Drafting lessons to reduce future conflict

Presented by Rachel MacGuire, Esq., Oracle and John Ritsick, Esq., Ritsick Law, LLC

Track D: Technology Law

IP Protection Strategies for Quantum, Robotics, and Space

- Strategic Balance: How innovators in quantum, robotics, and space—alongside Colorado university technology transfer offices—can balance patents and trade secrets to protect complex technologies while navigating export controls, academic collaborations, and federal funding obligations.
- Enforcement Realities: Why detecting and enforcing patents is uniquely difficult in these industries—and how blended protection strategies, including careful coordination between university inventors and industry partners, can mitigate risks of misappropriation and loss of commercialization rights.
- Business Alignment: How IP strategy should evolve with funding sources, government partnerships, and university licensing objectives to preserve long-term commercial and competitive advantage, from early-stage spinouts to mature companies seeking investment or acquisition.

Presented by Jocelyn Damgaard-Ensinger, Esq., Boeing; Rozhin Eskandarpour, Ph.D., Resilient Entanglement; and Sean Singleton, Ogelthorpe Capital, LLC
Moderated by Sara Patak, Esq., Wilson Sonsini Goodrich & Rosati

11:00 – 11:50 am

Breakout Sessions

Track A: Patents & Patent Litigation

Hybrid IP in a Changing Landscape: Safeguarding Innovation

- Managing overlapping patent, trade secret, and copyright rights
- Risk mitigation in collaborative and fast-moving environments
- Strategic protection for complex innovation portfolios
- Strategic selection between patent publication and trade secret protection

Presented by Jessica R. Hunter, Esq., Capella Space; Samantha Pak, Esq., Stryker; and Karen Lu, Esq., Cisco.

Moderated by Angela C. Tarasi, Esq., King and Spaulding, LLP

Track B: Trademarks/Copyrights

Trademark Updates

- Key rulings shaping brand protection
- Developments in registrability, enforcement, and use
- What trademark practitioners should prioritize
- Non-traditional marks including sounds, colors, and motion marks

Presented by David Bernstein, Esq., Debevoise & Plimpton, LLP

Track C: Licensing

Patent Indemnity Clauses: Allocating IP Risk in High-Value Deals

- Structuring indemnities to balance risk and deal value
- Common drafting traps and negotiation pressure points
- Lessons from disputes over patent indemnification

Presented by Victoria Donovan, Esq., Kutak Rock LLP; and Richard D. Spilde, Jr., Esq., Holland & Hart LLP

Track D: Technology Law

Praxis: Operationalizing AI in your Law Firm

- Turning AI tools into practical workflows
- Governance, ethics, and risk management considerations
- Real-world lessons from early adopters
- Measuring ROI and building internal buy-in for AI adoption

Presented by Avi Gesser, Esq., Debevoise and Plimpton, LLP

11:55 am – 1:25 pm

Luncheon

Sponsored by Kilpatrick Townsend & Stockton LLP
Lunch is included with your registration. Please indicate during registration if you plan to attend. CBA-CLE can provide vegetarian, vegan, and gluten-free options if requested.

12:35 - 1:25 pm
A Conversation with the USPTO Director
Presented by John Squires, Esq., Director, United States Patent and Trademark Office; Moderated by Mikaela Stone, Esq., King and Spalding, LLP

1:30 – 2:20 pm
Breakout Sessions

Track A: Patents & Patent Litigation
Legislative, Policy, & Agency Change

- How federal policy shifts affect IP and tech law
- Anticipating agency priorities and enforcement trends
- Strategic planning amid regulatory uncertainty

Presented by Peter-Anthony Pappas, U.S. Senate Committee on the Judiciary, and Wayne Stacy, Berkeley Center for Law & Technology

Track B: Trademarks/Copyrights
Brands and Breakneck Creatives

- IP clearance and protection in fast-paced content creation environments
- Balancing speed-to-market demands with trademark and copyright compliance
- Managing influencer collaborations and user-generated content risks

Presented by Will Hanisch, Esq., Green Room, Inc.

Track C: Licensing
Licensing Update

- Emerging trends reshaping IP licensing deals
- Drafting strategies for evolving technologies and markets
- Pitfalls to avoid in modern licensing agreements
- Major court rulings impacting license interpretation and enforcement
- Evolving royalty structures in response to economic and technological shifts

Everything you need to know about the last year in licensing.
Presented by Jeff C. Dodd, Esq., Hunton Andrews Kurth, LLP

Track D: Technology Law

The Rise of Agentic AI — Deployment, Risks, and Strategic Implications
- How autonomous AI agents change legal risk profiles
- Governance challenges for businesses and counsel
- Preparing clients for the next phase of AI adoption
- Liability allocation when AI systems act beyond programmed parameters
- Contractual and regulatory considerations for deploying agentic AI in business operations

Presented by Matthew Coleman, Esq., Orrick Herrington & Sutcliffe, LLP; Scott McKinney, Esq., Wilson Sonsini Goodrich & Rosati; and Lucky Vidmar, Esq., Microsoft

2:20 – 2:40 pm
Networking Break

2:40 – 3:30 pm
Breakout Sessions

Track A: Patents & Patent Litigation
Leveraging AI in IP Litigation
- AI tools for Rule 11 analysis, charting, prior art review, discovery, depositions, and trial
- Ethical and accuracy considerations in AI-assisted work
- Competitive advantages for modern IP practices
- Quality control and ethical boundaries when using AI in IP litigation

Presented by Lee Johnston, Esq., Haynes & Boone, LLP, Eric Lin, Esq., Patlytics; and Katherine Vessels, Esq., Cahill Gordon & Reindel LLP
Moderated by Mikaela Stone, Esq., King & Spalding

Track B: Trademarks/Copyrights
Enforcement Update: Anti-Counterfeiting
- New tools and strategies to combat counterfeits; criminal and civil remedies
- Cross-border enforcement challenges and solutions
- Brand protection in digital and physical marketplaces
- E-commerce platform takedown procedures and seller verification requirements

Presented by Jennifer Lane, Esq., Amazon; Airina L. Rodrigues, Esq., Brownstein Hyatt Farber Schreck LLP; and Alaina van Horn, Esq., U.S. Customs and Border Protection

Track C: Licensing

Licensing Issues in M&A

- IP diligence pitfalls that derail transactions
- Structuring licenses before and after deal close
- Managing consent, assignment, and valuation risks
- Change of control provisions and consent requirements
- Post-closing integration of licensed IP and renegotiation strategies

Presented by Tracy Rubin, Esq., Cooley

Track D: Technology Law

Trade Secret Update

- Developments in misappropriation and enforcement law
- Protecting confidential information in remote workplaces
- Best practices for prevention and litigation readiness

Presented by James (Jim) Pooley, Esq., James Pooley, PLC

3:35 – 4:25 pm

Breakout Sessions

Track A: Patents & Patent Litigation

Patent Eligibility Under 35 USC 101

- Current state of subject-matter eligibility doctrine
- Practical prosecution and litigation strategies
- How courts and the PTO are applying §101
- Proposed legislation

Presented by James Beard, Esq., Merchant & Gould, P.C.; Ben Fernandez, Esq., WilmerHale; and Michele Washington, Esq., Quarles & Brady LLP

Track B: Trademarks/Copyrights

Global Manufacturing: Cross Boarder Protection

- Coordinating patent, trade secret, and know-how protection across manufacturing jurisdictions
- Supply chain IP security and vendor risk management
- Enforcement strategies against cross-border infringement and gray market goods

Presented by Safir Anand, Esq., Anand and Anand and TBD

Track C: Licensing

Beyond Brulotte: Licensing Structures that Survive Legal & Commercial Scrutiny

- Creative royalty structures after Brulotte and Kimble
- Aligning legal compliance with business realities
- Drafting durable, enforceable license agreements
- Antitrust considerations in patent pool and standard-essential patent licensing

Presented by Guy Donatiello, Esq., Odyssey Pharmaceuticals Consulting; Thomas A. Magnani, Esq., Arnold & Porter; and Stephen MacKenzie, Esq., Patent Platform Services

Track D: Technology Law

AI Update

- Major legal and regulatory developments in AI
- Risk exposure across industries and use cases
- How AI law is evolving faster than compliance norms
- Regulatory frameworks emerging for AI governance and transparency

Presented by Sean P. Belding, Esq., Perkins Coie, and Jess Miers, Esq., The University of Akron School of Law

4:25 pm – 5:15 pm

Cocktail Reception

Sponsored by Venable LLP

Take this time to network with distinguished faculty and colleagues. Included in your registration! Please indicate if you plan to attend during the registration process.

Day 2 - Friday, May 29, 2026

7:45 – 9:00 am

Continental Breakfast

Sponsored by Quarles & Brady LLP

Continental Breakfast is included with your registration.

8:30 – 8:35 am

Welcome Back Remarks

Extended by Nathaniel T. Trelease, Esq., Program Chair, WebCredenza, Inc.

8:35 – 9:50 am

Big Picture Technology 2026: Power Supplies, Semiconductors, AI, & Robotics
- Power Supplies: insatiable demand for power generation (e.g., AI)
- Semiconductor manufacturing - national security issues
- Taiwan/China locking down IP
- AI generally

Presented by Frances A. Koncilja, Esq., Koncilja Law Firm, Chloe Mikel, Esq., Prime Data Centers, and Brad Watts, US Chamber of Commerce, Global Innovation Policy Center
Moderated by Wayne Stacy, Esq., Executive Director, Berkeley Center for Law & Technology

9:50 – 10:05 am
Networking Break

10:05 – 10:55 am
Breakout Sessions

Track A: Patents & Patent Litigation
UPC Update: One Year Later
- Key decisions shaping the Unified Patent Court
- Strategic considerations for global patent enforcement
- Lessons learned from early UPC practice
- Opt-out considerations and multi-jurisdictional litigation trends
- Practical guidance on navigating UPC procedures and forum selection

Presented by Bryce Matthewson, Esq., Powell Gilbert, and Randy Wu, Esq., 10X Genomics
Moderated by Mindy Sooter, Esq., Wilmer Hale

Track B: Trademarks/Copyrights
Zombie Trademarks and the Resurrection of Old Marks
- When abandoned marks can rise again
- Risk analysis for clearance and enforcement
- Strategic lessons from revived brands

Presented by Ryan D. Levy, Esq., Patterson Intellectual Property Law

Track C: Licensing
Leveraging AI in Your Licensing Practice
- Using AI to streamline negotiations and drafting
- Risk assessment for AI-driven deal tools

- Practical use cases for licensing professionals
- AI-powered royalty auditing and portfolio valuation tools
Presented by Leyla Smieja, Esq., Veritone, and Laurel Palluzzi, Esq., GC AI
Moderated by David Stone, Esq., Lockheed Martin

Track D: Technology Law

Running Patents Like a Business: Leadership Lessons from Top Corporate IP Teams
- Managing patent portfolios for ROI and impact
- Metrics, budgeting, and stakeholder alignment
- Insights from high-performing in-house IP groups
- Building cross-functional collaboration between IP, R&D, and business units
Presented by Aaron Brodsky, Esq., Trimble Inc.; and B.C. Moore, Esq., Illumina, Inc.

Moderated by William Barrett. Esq., Wilson Sonsini

11:00 – 11:50 am
Breakout Sessions

Track A: Patents & Patent Litigation
Go Your Own Way: Which Type of Post-Grant Review is Best For You?
- Strategic use of IPRs and PGRs after recent rulings
- Tactical considerations for challengers and patentees
- Lessons from successful and failed proceedings
- Timing considerations and estoppel effects in parallel litigation
Presented by Jessica C. Kaiser, Esq., Perkins Coie, and Justin Krieger, Esq., Kilpatrick Townsend & Stockton, LLP

Track B: Trademarks/Copyrights
Copyright Updates
- Key cases redefining copyright boundaries
- Developments impacting creators, platforms, and licensors
- Digital copyright challenges including streaming, NFTs, and generative AI
- DMCA safe harbor developments and takedown practice updates
Presented by Ian C. Ballon, Esq., Greenberg Traurig, LLP

Track C: Licensing

Modern IP and Content Distribution Pathways

- Evolving models for digital content monetization
- Legal risks in platform-driven distribution
- Structuring rights for emerging channels
- Licensing models for streaming, social media, and emerging digital platforms
- Rights fragmentation challenges across territories and delivery channels
- Adapting traditional content deals to subscription and ad-supported models

Presented by Will Hanisch, Esq., GreenRoom, Inc.

Track D: Technology Law

Domestic Privacy Update

- Key regulatory, statutory, and enforcement developments
- Compliance challenges across state and federal regimes
- Practical guidance on data minimization and consumer rights management for advising clients in a shifting landscape
- FTC enforcement priorities and recent consent decree requirements

Presented by David Navetta, Esq., Troutman Pepper Locke

12:05 – 1:10 pm

Luncheon

Sponsored by Holland & Hart

Lunch is included with your registration. Please indicate during registration if you plan to attend. CBA-CLE can provide vegetarian, vegan, and gluten-free options if requested.

12:20 – 1:10 pm

AI Ethics

Presented by Thomas Phelan, and Thomas Spahn, Esq., McGuire Woods LLP

Submitted for 1 Ethics Credit

1:15 – 2:05 pm

Breakout Sessions

Track A: Patents & Patent Litigation

Leveraging AI in Patent Prosecution

- AI-assisted application and office action response drafting

- Prior art search and analysis and patentability prediction tools
- Maintaining attorney supervision and ethical compliance with USPTO requirements

Presented by Michael Binns, Esq., Meta, and Ian Schick., Paximal
Moderated by Craig Neugeboren, Esq., Neugeboren O'Dowd PC

Track B: Trademarks/Copyrights

NIL and Right of Publicity Update

- AI Actors
- Sports and Entertainment law
- Publicity rights in memes
- NCAA Althletes

Presented by Emily Keimig, Esq. and Philip Sheng, Esq., Venable LLP

Track C: Licensing

Navigating Global Trends in SEPs and FRAND Licensing

- Recent court decisions on fair, reasonable, and non-discriminatory licensing terms
- Portfolio licensing practices and valuation methodologies for standards-essential patents
- Jurisdiction shopping and anti-suit injunction tactics in international SEP disputes

Presented by Michelle Aspen, Esq., Shook, Hardy & Bacon and Manny Caixeiro, Esq., Venable LLP; additional speaker to be named.

Track D: Technology Law

Global Privacy Update

- Emerging patentability issues in non-classical computing algorithms
- Trade secret versus patent strategies for deep tech innovations
- Strategies for IP protecting in space
- Aligning IP strategy with unique funding pathways in defense tech

Presented by Austin T. Chambers, Esq., Dorsey & Whitney, LLP, and Beth Magnuson, Esq., Thomson Reuters Practical Law

2:10 – 3:00 pm

Breakout Sessions

Track A: Patents & Patent Litigation

Documenting the Digital Inventor: Compliance Strategies for AI-Assisted Inventions

- Best practices for documenting human contribution in AI-assisted innovation

- Navigating inventorship, disclosure, and compliance risks
- Preparing prosecution records for increased scrutiny

Presented by Rachel Herder, Esq., Mammoth Biosciences and Jose J. Jimenez, Esq., Polsinelli PC

Moderated by Phil Harris, Esq., Holland & Hart

Track B: Trademarks/Copyrights

Font Copyrights & Litigation

- Copyright protection and limits for typefaces and fonts
- Recent litigation trends and enforcement strategies
- Practical guidance for designers, licensors, and platforms

Presented by Olivia M. Clavio, Esq., Faegre Drinker, and Tim Costello, Esq., Monotype

Track C: Licensing

Unlocking Value: Strategic Approaches to IP Portfolio Monetization

- Aligning IP assets with business and revenue goals
- Monetization strategies beyond traditional licensing
- Evaluating risk, valuation, and deal structures
- Patent assertion entities, NPE transactions, and defensive aggregation models
- Tax considerations and financial structuring for IP monetization deals

Presented by Ami Shah, Esq., Fortress Investment Group, and Jonathan Stroud, Esq., Unified Patents, LLC; additional speaker to be named

Moderated by Mollybeth (Molly) R. Kocialski, Esq., Holland and Hart

Track D: Technology Law

Renewables/Power Density/Climate

- IP advantages and challenges in energy, storage, and climate technologies
- Protecting innovation in rapidly evolving clean-tech markets
- Regulatory, investment, and commercialization considerations
- Green technology licensing initiatives and standard-essential patent issues
- Trade secret protection for clean energy manufacturing processes and materials

Presented by Frances A. Koncilja, Esq., Koncilja Law Firm, and George Simion, Esq., Terra Power, LLC

3:00 – 3:30 pm

Beer Tasting

- Voir Dire Beer®

- Infringement IPA®
- Lawyer's Lager®
Sponsored by Faegre Drinker

3:30 – 4:20 pm
Lawyer Ethics and Difficult Law, Facts, and Clients
Presented by Thomas Spahn, Esq., McGuire Woods, LLP
Submitted for 1 Professional Responsibility Credit

4:20 pm
Adjourn