



IPTA

THE INSTITUTE OF PATENT
AND TRADE MARK
ATTORNEYS OF AUSTRALIA

Academy of Education

Institute of Patent and Trade Mark Attorneys of Australia

MASTERCLASS IN IP VALUATION

9-10 September 2019
Data61 at CSIRO
SYDNEY

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MASTERCLASS IN IP VALUATION

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Why attend this masterclass?

The IPTA Academy of Education Masterclass in IP Valuation is a one and a half day course which will teach you the important concepts in valuation methodology, as well as put the learning into practice, with examples in value-based strategy, IP transactions, fund raising, litigation, licensing, JV's, M&A, financial reporting and tax. Learn about valuation in an R&D commercialisation environment, and as part of a framework for managing an IP portfolio.

About the facilitator - Tim Heberden

Tim is a partner at Deloitte where he leads the *IP Advantage* team that specialises in valuing, managing and monetising IP assets. He has valued IP, and given royalty opinions, for litigation, M&A, commercialisation, IP portfolio management, licensing, financing, accounting and tax. Tim is the author of the global *Guidance Note on the Valuation of Intellectual Property Rights*, and the author of a chapter on royalty determination for '*International Technology Transfer: Practice and the Law*'. He is listed in the *IAM Strategy 300 – the World's Leading IP Strategists*.



Tim brings an economic lens to articulating the value of IP, and determining value optimising strategies. This is achieved by integrating insights from IP landscapes, consumer research, financial benchmarking, and legal assessments into coherent economic models.

At IPTA we are eager to empower you with the tools you need to enhance your already remarkable skills.

DATES & VENUE

Location	Date	Time	Venue
Sydney	9 th & 10 th September 2019	Mon 9.00am - 5.00pm	Data61/CSIRO Building (Map) Level 4 Seminar Room 13 Garden St, Eveleigh, NSW
		Tue 9.00am - 3.15pm	

FORMAT:

Run over 2 days with morning and afternoon Tea/Coffee and lunch provided

COST

IPTA Members \$650

*YIPTA Members \$550

Spaces are limited to ensure a personal learning experience

REGISTER TODAY

If you would like to attend, please register online by Friday, 23 August 2019.

Please call IPTA on (03)9639 4377 if you require more information

*YIPTA – members of IPTA with less than 5 years post-registration experience as patent and/or trade mark attorneys

Course Outline – Masterclass in IP Valuation

Day 1

9:00am	Registration
9:30am	Applications and examples of IP valuation (R&D & IP resource allocation; business planning; commercialisation; IP portfolio management; performance tracking; raising equity & debt funding; litigation; licensing; M&A; JVs; financial reporting; tax planning & compliance)
10:30am	Morning Tea
11:00am	Steps in a valuation and important concepts <ul style="list-style-type: none">• Standards and guidelines• Scope: level of rigour• Basis and premise of value• Briefing and reviewing a valuation
12:30pm	Lunch
1:30pm	Characteristics of IP that influence value <ul style="list-style-type: none">• Scalability; non-linear returns; risk profile; economic life; inefficient markets; ownership impact• Requirement: assessment of functional, legal and economic characteristics of IP asset• Implications of misjudging value
2:30pm	Afternoon Tea
3:00pm	Guest speaker: CSIRO commercialisation perspective
3:30pm	Valuation approaches and methods <ul style="list-style-type: none">• Replacement cost• Market approach• Income approach
5:00pm	End of Day 1

Course Outline – Masterclass in IP Valuation Day 2

9:00am	Gauging the strength of IP assets to inform valuation assumptions <ul style="list-style-type: none">• Technology• Brands
9:30am	IP royalty determination <ul style="list-style-type: none">• Benchmarking of arm's length licenses• Profit split• Rules of thumb
10:30am	Morning Tea
11:00am	Use of valuation case studies to illustrate valuation analysis, pitfalls and cross-checks
12:00pm	Guest speaker: investor perspective
12:30pm	Lunch
1:15pm	Putting the learning into practice <ul style="list-style-type: none">• Self-evaluation quiz• Group case study and discussion of workings• Q&A and recap
3:15pm	End of Masterclass in IP Valuation