

FICPI 16th Open Forum

Retirement & Mentoring: Keeping Knowledge Within the Firm

MODERATOR: Eugene Arieivich, Partner, Baker & McKenzie, Moscow, Russia

SPEAKERS: Brett Slaney, Patent Agent, BLAKES, Toronto, Canada

Peter Huntsman, Patent Attorney, Davies Collison Cave, Melbourne, Australia

André Werner, Patent Attorney, Troesch Scheidegger Werner AG, Zumikon, Switzerland

St.Petersburg, Russia

October 5-8, 2016

The logo for Baker & McKenzie, featuring the text "BAKER & MCKENZIE" in white capital letters on a dark red rectangular background.

BAKER & MCKENZIE

The logo for Blakes, featuring the word "Blakes" in a black, cursive script font, positioned above a light grey horizontal bar.

Blakes

The logo for Davies Collison Cave, featuring a yellow square with a black diagonal line on the left, followed by the text "DAVIES COLLISON CAVE" in black capital letters, and "INTELLECTUAL PROPERTY" in smaller black capital letters below a horizontal line.

DAVIES
COLLISON
CAVE
INTELLECTUAL PROPERTY

The logo for TSW pat!, featuring the text "TSW" in white capital letters above a black rectangular box containing the text "pat!" in white lowercase letters with an exclamation point.

TSW
pat!

EUGENE ARIEVICH

PROFESSIONAL HISTORY

- 1973 - 1988 The USSR Patent and Trademark Office:
researcher - examiner - senior examiner - deputy head of trademark examination
- 1988 - 1996 Partner in the first independent IP boutique in Russia
- 1991 Visiting attorney in IP boutique in NY
- 1996 - 2017 Partner and Head of IP Practice, Russia and CIS, Baker & McKenzie
- 2017.... Who knows?

PETER HUNTSMAN

PROFESSIONAL HISTORY

- 1973 Started in profession in London, UK as Graduate
- 1976 Opened Birmingham, UK office for same firm
- 1980, 1981 Qualified CPA, EPA
- 1984 Qualified Australian Registered Patent & TM Attorney
- 1986 Partner of Davies & Collison (later DCC)
- 1989~ Principal partner of Materials' Science group
- up to 6 patent attorneys / technical assistants
 - eventually total of 3 partners
- 2015 Retired from DCC partnership
- 2015 Consultant Employee of DCC, full time, mainly remote
- 2016 Consultancy renewed, part time, mainly remote
- 2016 August: DCC incorporates - now subsidiary of public company Qantm Intellectual Property

André Werner

PROFESSIONAL HISTORY

- 1987 Starting work as trainee in a small IP boutique (SW, 3 Attorneys)
- 1990 Merging into TSW, now 6 Attorneys; responsible for implementing IT and reorganization of book-keeping, renewal department and backoffice
- 1994 Integrating a single IP office into TSW, working part-time in this office, having full responsibility for this office, recognizing effect of a partner leaving the office
- 1996 Becoming equal share partner, more responsibility in decision finding/making
- 1997 Integrating a further single IP office into TSW, in charge of escorting and supervising senior partners to retire
- 2013 Modification of partnership, retiring process of two senior partners and merging another IP office into TSWpat-group; actually being 15 Attorneys
- 2018 Envisaged end of retiring process and finalizing model of TSWpat group
- 2022 Envisaged time to finally handover managing responsibility to successor(s)

Brett Slaney

PROFESSIONAL HISTORY

- 2002 – 2003 Engineering internships with boutique patent agency firm
 - Orange & Chari
- 2004 Joined Blake, Cassels & Graydon LLP
 - patent agent trainee and associate
- 2006 Qualified as Canadian patent agent
- 2007 Joined FICPI
- 2012 Appointed to CET Executive of FICPI
- 2013 Partner of Blake, Cassels & Graydon
- 2016 Currently still partner at Blakes
- ...
- 2045 Anticipated year for mandatory retirement
- 2046 - ???

Discussion Outline/Burning Issues

- Retirement Policy
- Incentives to Retirees vis-à-vis Incentives to Younger Partners
- Transitioning Client Relationships and Management Functions
- Life After Retirement
- Do's and Dont's of Retirement

Retirement Policy

- Is it necessary to have one?
If so, what should it include?
- Mandatory retirement age?
- Enforcing or Encouraging Retirement?

Incentives to Retirees vis-à-vis Incentives to Younger Partners

- Retirement benefits
- Differences between small/medium/large firms
- Compensation for legal work/BD activities after retirement
- How to keep younger partners in the firm until elders retire

Transitioning Client Relationships and Management Functions

- When to begin?
- Managing client's concerns and expectations
- Choosing and grooming a successor/successors

Life After Retirement

- Drawing the line: how much involvement in the firm's life is good for all?
- Of counsel, consultant, sub-contractor?
- Social involvement
- Teaching, writing, practicing law – any limitations?

Do's and Dont's of Retirement

- Respect and help each other
- Coordinated communication
- No blanket hogging and burning bridges

Thank you very much for your attention!

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