FICPI 16th Open Forum

Retirement & Mentoring: Keeping Knowledge Within the Firm

MODERATOR: Eugene Arievich, 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
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?
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>1973</td>
<td>Started in profession in London, UK as Graduate</td>
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<td>1976</td>
<td>Opened Birmingham, UK office for same firm</td>
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<tr>
<td>1980, 1981</td>
<td>Qualified CPA, EPA</td>
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<td>1984</td>
<td>Qualified Australian Registered Patent &amp; TM Attorney</td>
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<td>1986</td>
<td>Partner of Davies &amp; Collison (later DCC)</td>
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<td>1989~</td>
<td>Principal partner of Materials’ Science group</td>
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<td></td>
<td>- up to 6 patent attorneys / technical assistants</td>
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<td></td>
<td>- eventually total of 3 partners</td>
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<tr>
<td>2015</td>
<td>Retired from DCC partnership</td>
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<tr>
<td>2015</td>
<td>Consultant Employee of DCC, full time, mainly remote</td>
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<tr>
<td>2016</td>
<td>Consultancy renewed, part time, mainly remote</td>
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<td>2016</td>
<td>August: DCC incorporates - now subsidiary of public company Qantm Intellectual Property</td>
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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 Don’t’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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