



Compliance Course Agreement Maintenance Course IP Portfolio Management Course

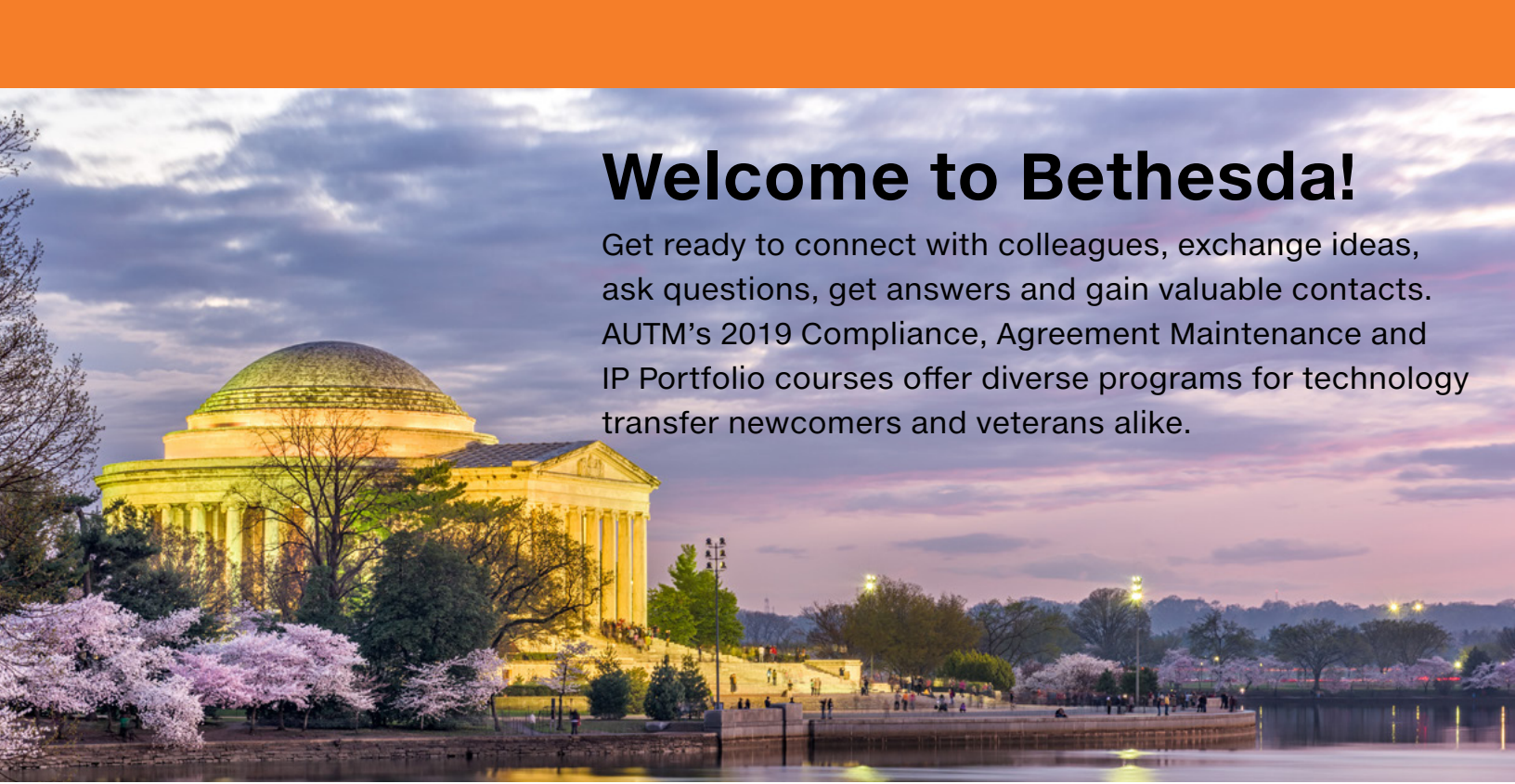
October 28-30
Hyatt Regency Bethesda
Bethesda, Maryland



autm.net/agreement
autm.net/compliance
autm.net/portfolio

#AGREEMENT19
#COMPLIANCE19
#PORTFOLIO19





Welcome to Bethesda!

Get ready to connect with colleagues, exchange ideas, ask questions, get answers and gain valuable contacts. AUTM's 2019 Compliance, Agreement Maintenance and IP Portfolio courses offer diverse programs for technology transfer newcomers and veterans alike.

About AUTM

AUTM is the nonprofit leader in efforts to educate, promote and inspire professionals, throughout their careers, to support the development of academic research that changes the world. AUTM's community is comprised of more than 3,000 members who work in more than 800 universities, research centers, hospitals, businesses and government organizations around the globe.

Certified Licensing Professionals Continuing Education

Certified Licensing Professionals (CLP) are required to demonstrate continued competence in their field to maintain their certification status. Individuals who hold the CLP designation can renew their credential by earning at least 40 continuing education credits. All AUTM professional development courses and designated educational offerings on the topics of licensing, technology transfer and technology commercialization at AUTM courses or meetings are eligible for CLP continuing education credits for certification renewal. Visit www.licensingcertification.org for more information on the certification requirements.

Compliance Course Sponsors

TreMonti

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EUROPEAN PATENT AND TRADE MARK ATTORNEYS



Compliance course leadership:

Program Co-chairs:

Sabrina Darnell,
University of Kentucky
Michelle O'Shea,
Borman & Company, LLC

Program Committee:

Rebecca Hernandez,
California Institute of Technology
Corin Hindenach,
University of Louisville
Bethany Loftin, JD,
TreMonti Consulting, LLC
Gina Smutz,
Washington University in St. Louis

Agreement Maintenance course leaders:

Program Chair:

Jennifer Folger,
Michigan State University

Program Committee:

Tiffany Beverly, JD,
University of South Carolina
Karen Boghossian,
Inteum Company LLC
Judy B. O'Neal, Auburn University
DawnMarie Portoff, Yale University
Sabrina Darnell,
University of Kentucky
Michael Tempero, JD,
Mount Sinai Innovation Partners

Intellectual Property Portfolio Management course leadership:

Program Co-chairs:

Kimberly Dunn, GACP,
Thomas Horstemeyer LLP
Lee C. Heiman, JD, Azos AI LLC

Program Committee:

Karen Boghossian, Inteum Company
Courtney Grate, NUtech Ventures
Glenn Ladwig, JD,
Saliwanchik Lloyd & Eisenschenk
Felicia Metz, JD,
University of Maryland
Carol Priddy,
Washington University in St. Louis

The AUTM Compliance Course will provide 16 hours of continuing education credits for those who attend the entire meeting.

The AUTM Agreement Maintenance Course will provide 15 hours of continuing education credits for those who attend the entire meeting.

The AUTM IP Portfolio Management Course will provide 16 hours of continuing education credits for those who attend the entire meeting.



TreMonti Consulting, LLC is focused on providing industry leading research compliance management services to universities, research institutes, and government organizations. We have rendered advice on best practices in Bayh-Dole compliance and advise clients regarding policy requirements, compliance management process, reporting (including iEdison reporting), best practices, educational programs, auditing, and other issues relating to federal reporting compliance. Our services cover the entire Bayh-Dole compliance process. Whether you are cleaning up existing notifications, entering previously unreported technologies, starting a research compliance program, or analyzing the effectiveness of your existing program we can provide you with the support and advice to succeed.



Congratulations to all the RTTP-certified speakers and moderators presenting at this week's Compliance, IP Portfolio and Agreement Maintenance courses. Want to showcase your expertise? Visit www.attp.info and become a Registered Technology Transfer Professional Candidate.



Compliance Course Agenda

Monday, October 28

7 – 7:45 am

Breakfast

Location:

Terrace

7 am – 5 pm

Registration

Location:

Meeting Room Foyer

7:45 – 8 am

Welcome and Introductions from the Chairs

Location:

Cabinet/Judiciary

Program Chairs:

Sabrina Darnell,
University of Kentucky
Michele O'Shea,
Borman & Company, LLC

The Co-chairs will give a brief overview of AUTM, membership benefits, and its role in the technology transfer profession.

8 – 8:45 am

Bayh-Dole Update at the Federal Level

Location:

Cabinet/Judiciary

Speakers:

Paul Zielinski,
National Institute of Standards and Technology

Join us for an update on federal regulation changes across all agencies and a discussion on the implications for institutions regarding non-compliance and the necessary communication between sponsored research and the technology transfer office.

8:45 – 10 am

Bayh-Dole Compliance: iEdison Update

Location:

Cabinet/Judiciary

Speakers:

Scott Cooper,
National Institutes of Health
Ann Hammersla,
National Institutes of Health

Our speakers will review key Bayh-Dole compliance obligations and initiatives of the National Institutes of Health. You will learn all the requirements for compliance under Bayh-Dole disclosures including all deadlines related to reporting federally funded inventions.

10 – 10:30 am

Break

Location:

Meeting Room Foyer

10:30 am – Noon

Location:

Speakers:

iEdison Reporting I

Cabinet/Judiciary

Scott Cooper,
National Institutes of Health
Mary Fran Deutsch,
National Institutes of Health
Ann Hammersla,
National Institutes of Health

This session is an advanced discussion of iEdison, reviewing the step-by-step process of reporting an invention through its entire cycle, including recommendations on how to resolve problems such as advanced reporting, linking patent families, waivers and regulation questions.

Noon – 1:30 pm

Location:

Lunch

Terrace

1:30 – 3 pm

Location:

Speakers:

iEdison Reporting II

Cabinet/Judiciary

Scott Cooper,
National Institutes of Health
Mary Fran Deutsch,
National Institutes of Health
Ann Hammersla,
National Institutes of Health

This session continues the advanced discussion of iEdison, reviewing the step-by-step process of reporting an invention through its entire cycle, including recommendations on how to resolve problems.

3 – 3:30 pm

Location:

Break

Meeting Room Foyer

3:30 – 4:15 pm

Location:

Speaker:

Invention Reporting – National Institutes of Health

Cabinet/Judiciary

Ann Hammersla,
National Institutes of Health

Ann Hammersla, Director of the Division of Extramural Inventions and Technology Resources of the National Institutes of Health (NIH), will discuss how Bayh-Dole reform affects NIH compliance and reporting processes.

4:15 – 5 pm

Location:

Speakers:

Open Forum – National Institutes of Health

Cabinet/Judiciary

Your National Institutes of Health questions will be answered and your problems addressed.



Compliance Course Agenda

Monday, October 28 (continued)

5:30 – 7 pm

Welcome Reception

Location: Terrace

Socializing face-to-face with colleagues and industry pros has never been easier. Bring business cards!

Tuesday, October 29

7 – 8 am

Breakfast

Location: Terrace

7 am - 5pm

Registration

Location: Meeting Room Foyer

8 – 9 am

Invention Reporting – National Aeronautics and Space Administration

Location: Cabinet/Judiciary

Speaker: Irene Cierchacki,
National Aeronautics and Space Administration

National Aeronautics and Space Administration (NASA) has its own system of compliance different from all other federal agencies. This session will be an advanced course on NASA compliance reporting requirements including process, utilization, data collection and answers to reporting questions.

9 – 10 am

Invention Reporting – National Science Foundation

Location: Cabinet/Judiciary

Speakers: Kaelynne Nill,
National Science Foundation
Suzanne Plimpton,
National Science Foundation
Dana Thibodeau,
National Science Foundation

Representatives from the National Science Foundation (NSF), will provide an overview of NSF's compliance processes, including Bayh-Dole reform. Speakers will also identify items unique to the NSF reporting requirements, iEdison notification resolutions and questions, and provide the current NSF contact information.

10 – 10:30 am

Break

Location: Meeting Room Foyer

10:30 – 11:15 am

Reporting Requirements – US Air Force

Location:

Cabinet/Judiciary

Speaker:

Chastity D. S. Whitaker,
Air Force Materiel Command

US Air Force speaker Chastity D. S. Whitaker, will discuss current reporting requirements specific to the Air Force. This advanced presentation provides an overview of the USAF process, utilization, and data collection. There will be Q&A and some Department of Defense contact details will be provided.

11:15 am – Noon

Invention Reporting – Department of Energy

Location:

Cabinet/Judiciary

Speakers:

Michael Dobbs,
Department of Energy
Marianne Lynch,
Department of Energy
Maritza Rodriguez,
Department of Energy

In this session, we will discuss current processes for reporting under the new Bayh-Dole reform including, utilization and data collection, focusing on areas that may be unique to the Department of Energy (DOE). Reporting questions will be answered and current DOE contacts will be provided during this advanced compliance session.

Noon – 1:30 pm

Lunch

Location:

Terrace

1:30 – 3 pm

Notification Messages and How to Clear Them

Location:

Cabinet/Judiciary

Speakers:

Bethany Loftin,
TreMonti Consulting, LLC
Gina Smutz,
Washington University in St. Louis

In this session, we will discuss how to reduce your iEdison notification messages. We will provide strategies on how to approach your notifications as well as guidance and tips on how to address each notification type.

3 – 3:30 pm

Break

Location:

Meeting Room Foyer



Compliance Course Agenda

Tuesday, October 29 (continued)

3:30 – 5 pm

Disclosures, Patents and Utilization Best Practices

Location:

Cabinet/Judiciary

Speakers:

Sabrina Darnell,
University of Kentucky
Bethany Loftin,
TreMonti Consulting, LLC

In this session, we will discuss Disclosures, Patents, and Utilization Reports. Instructors will share tips and lessons learned to help you strengthen your institution's compliance program.

regulation updates, invention closeout, and various tips and tricks for compliance administration.

10 – 10:30 am

Break

Location:

Meeting Room Foyer

10:30 am – Noon

Still have questions? We have time.

Location:

Cabinet/Judiciary

Speakers:

Compliance Committee

Stick around for some additional Q&A with compliance specialists. Head back to your office with all the answers you need to stay in compliance.

Wednesday, October 30

7 – 8 am

Breakfast

Location:

Terrace

7 – 10:30 am

Registration

Location:

Meeting Room Foyer

8 – 10 am

Compliance Committee Round Table Wrap-up Followed by Q&A

Location:

Cabinet/Judiciary

Speakers:

Compliance Committee

The 2019 AUTM Compliance Committee will wrap-up the conference. Discussion topics include Bayh-Dole

10:30 am – 1 pm

Offsite Tour: USPTO Headquarters

Advanced registration is required. No onsite registration is available.

The tour will visit the museum and the public search facility. It begins at 11:30 a.m. and ends at 1 p.m. Transportation will be provided.



Agreement Maintenance Course Agenda

Monday, October 28

7 – 8 am Breakfast

Location: Terrace

7 am – 5 pm Registration

Location: Meeting Room Foyer

8 – 10 am Anatomy of a License and Other Agreements

Location: Embassy/Patuxent/Potomac
 Speakers: Cory Acuff, *University of Georgia*
 Tiffany Beverly, *University of South Carolina*

This session will walk participants through license agreements with special attention to the terms that are most relevant to participants. The session will include interactive discussion of various licensing terms and of best practices for administering license agreements.

10 – 10:30 am Break

Location: Meeting Room Foyer

10:30 am – Noon Agreement Compliance: Positioned for Success!

Location: Embassy/Patuxent/Potomac
 Speakers: Cory Acuff, *University of Georgia*
 Brian Wright, *Auburn University*

If your organization has just completed the signing of a new agreement or you are faced with maintaining an existing agreement, what actions can you take to position yourself for success? This session will focus on agreement compliance, centering on both financial and non-financial terms. Learn about instituting pre-agreement procedures that enhance post-license compliance while focusing on building and maintaining the relationships with your partners that are essential to getting technology and products to market and creating value.

Noon – 1:30 pm Lunch

Location: Terrace

1:30 – 3pm IIA Maintenance – Why It's Tricky

Location: Embassy/Patuxent/Potomac
 Speakers: Korie Counts, *Ohio University*
 Jennifer Folger, *Michigan State University*

Collaborative Research frequently ends with jointly owned Inventions, which come with a unique set of risks and liabilities. Through an Inter-Institutional Agreement (IIA), we

seek to mitigate and share these risks with joint owners. The IIA covers ownership, patent prosecution, marketing, reporting and licensing – and financial obligations. How can your office effectively and efficiently meet these obligations and be a good partner? This panel will share universities' journeys including goals, planning, process and struggles along the way.

3 – 3:30 pm Break

Location: Meeting Room Foyer

3:30 – 5 pm Tales From the Trenches

Location: Embassy/Patuxent/Potomac
 Speaker: Sabrina Darnell, *University of Kentucky*

Are you looking to discuss specific issues you struggle with in your job? Are you searching for resources that will give you a way forward in managing your institution's agreement portfolio? Do you need a place to start? Your search is over! We will use this time to discuss actual challenges faced by our attendees. Join us for this facilitated discussion where we will pool our experiences and solutions to talk about real-world situations that can (and must) be addressed.

5:30 – 7 pm Welcome Reception

Location: Terrace

Socializing face-to-face with colleagues and industry pros has never been easier. Bring business cards!

Tuesday, October 29

7 – 8 am Breakfast

Location: Terrace

7 am – 5 pm Registration

Location: Meeting Room Foyer

8 – 10 am Strategies to Get Licensees to Pay Up

Location: Embassy/Patuxent/Potomac
 Speakers: DawnMarie Portoff, *Yale University*
 Rose Robotham, *NUtech Ventures*

The term sheets are agreed upon, the license is executed, the upfront fee is paid, development reports are submitted, the net sales definition is excellent, and now there's been a first commercial sale. What are ongoing strategies to ensure prompt and full payment for your royalty income?

10 – 10:30 am Break

Location: Meeting Room Foyer



Agreement Maintenance Course Agenda

Tuesday, October 29

10:30 am – Noon **A License and How It Changes!**

Location: Embassy/Patuxent/Potomac
Speakers: Jennifer Folger,
Michigan State University
Brian Wright, *Auburn University*

Your agreement is fully executed, the database is populated, and everything is chugging along. Until it isn't. In this session, we will discuss common hurdles in agreement management including, new licensee personnel; acquisition of your licensee; new interpretations of old language; and amendments. Join us for a look at adding technology, dropping technology, acquainting new folks with their obligations, and the work that goes along with this.

Noon – 1:30 pm **Lunch**

Location: Terrace

1:30 – 3 pm **Let's Talk Financials: Royalties and Distribution of License Income**

Location: Embassy/Patuxent/Potomac
Speakers: Sabrina Darnell,
University of Kentucky
Nanette Roberts,
University of Georgia

Each technology transfer office has its own established policies and procedures for distributing licensing or royalty income. This session will demonstrate the importance of understanding the terms and status of agreements, understanding royalty distribution policies, communicating with royalty participants, establishing a standard royalty distribution process, and avoiding obstacles while completing the distribution. This group will discuss the framework as well as provide useful tools that can help technology transfer professionals smoothly carry out this important task.

3 – 3:30 pm **Break**

Location: Meeting Room Foyer

3:30 – 5 pm

Location:

Speakers:

Sponsor Agreements and Their Impact on Tech Transfer

Embassy/Patuxent/Potomac
Tiffany Beverly,
University of South Carolina
DawnMarie Portoff, *Yale University*

Sponsored projects are the lifeblood of many departments. We will discuss what involvement your office has (or should have) in negotiations, drawing the line in the sand for research and downstream obligations, reach-through for royalty and other obligations these agreements bring to your department.

Wednesday, October 30

7 – 8 am

Location:

Breakfast

Terrace

7 – 10:30 am

Location:

Registration

Meeting Room Foyer

8 – 10 am

Location:

Speakers:

Using Technology Automation to Manage Contracts

Embassy/Patuxent/Potomac
Carla L. Garic,
Borman & Company, LLC
Linda Kesselring, *Emory University*

Listen as our panel discusses the latest innovations in technology transfer contract management at each point in the agreement maintenance setup and monitoring cycle. The panel will also cover opportunities and pitfalls in using contract management software.

10 – 10:30 am

Location:

Break

Meeting Room Foyer

10:30 am – 1 pm

Advanced registration is required. No onsite registration is available.

The tour will consist of visiting the museum and the public search facility. The tour begins at 11:30 a.m. and ends at 1 p.m. Transportation will be provided.

Offsite Tour: USPTO Headquarters



IP Portfolio Management Agenda

Monday, October 28

7 – 8 am Breakfast

Location: Terrace

7 am – 5 pm Registration

Location: Meeting Room Foyer

8 – 9:15 am Invention Disclosures

Location: Old Georgetown/Congressional

Speakers: Kelly Bialek, *University of Akron*
Courtney Grate, *NUtech Ventures*

Invention disclosures are the foundation of the technology transfer process. This session will cover the process associated with obtaining and evaluating an invention disclosure, as well as managing the funding compliance related to an invention.

9:15 – 10 am Update on NIST

Location: Old Georgetown/Congressional

Speaker: Paul Zielinski,
National Institute of Standards and Technology

Join us for an update on federal regulation changes across all agencies and a discussion on the implications for institutions regarding non-compliance and the necessary communication between sponsored research and the technology transfer office.

10 – 10:30 am Break

Location: Meeting Room Foyer

10:30 am – Noon US Patent Process

Location: Old Georgetown/Congressional

Speakers: Kathleen Chaffee,
Washington University in St Louis
Lee Heiman, *Azos AI LLC*
Glenn Ladwig,
Saliwanchik Lloyd & Eisenschenk

The patent process requires a high-level skill set and a wide knowledge base. Join us to learn or enhance your understanding of the US patent application process from start to finish. In the first session, we will discuss inventorship and date of invention, priority dates, and patent term; application types; parts of an application; subject matter eligibility; novelty, non-obviousness, and application sufficiency under Title 35 of the US Code; and common myths about patents.

Noon – 1:30 pm Lunch

Location: Terrace

1:30 – 3 pm US Patent Process (continued)

Location: Old Georgetown/Congressional

Speakers: Kathleen Chaffee,
Washington University in St Louis
Lee Heiman, *Azos AI LLC*
Glenn Ladwig,
Saliwanchik Lloyd & Eisenschenk

In the second session, we will discuss patent searching, the duty of disclosure, and information disclosure statements; patent ownership, assignment, and the address of record at the PTO; preparing and filing provisional and non-provisional applications; “needs” and attorney-client communication during drafting and prosecution; official fees and applicant fee status; electronic filing (EFS) and status (PAIR) systems; the US prosecution process; PTO deadlines, extensions of time, and related fees; examination backlog, the “14/4/4/4 rule” and procedures for accelerating examination; and official notices and other channels of communication.

3 – 3:30 pm. Break

Location: Meeting Room Foyer

3:30 – 5 pm US Patent Process (continued)

Location: Old Georgetown/Congressional

Speakers: Kathleen Chaffee,
Washington University in St Louis
Lee Heiman, *Azos AI LLC*
Glenn Ladwig,
Saliwanchik Lloyd & Eisenschenk

In the third session, we will discuss working with the USPTO; managing patent prosecution: the four major types of official actions during prosecution, and responsive actions by the applicant; allowance of claims and patent issuance; patent term extension and patent term adjustment; anatomy of an issued patent; correcting errors in an issued patent; copendency, continuing applications, and patent application families; maintaining patents in force; licensing; and post-issuance changes of ownership.

5:30 – 7 pm Welcome Reception

Location: Terrace

Socializing face-to-face with colleagues and industry pros has never been easier. Bring business cards!



IP Portfolio Management Agenda

Tuesday, October 29

7 – 8 am

Breakfast

Location:

Terrace

7 am – 5 pm

Registration

Location:

Meeting Room Foyer

8 – 9 am

PCT Applications

Location:

Old Georgetown/Congressional

Moderator:

Kim Dunn, *Emory University*

Speaker:

Michael Neas, *USPTO*

Bring your questions! This session will focus on the Patent Cooperation Treaty (PCT) process and the available strategies for making smart and cost effective decisions. A senior member of the USPTO PCT Legal Office, together with an IP patent attorney, will provide an overview of the PCT process, timelines, formalities, and strategies for complying with routine and advanced issues. The discussion will include filing techniques, entity status, receiving offices, searching authority, correct defects, publication, Chapter II demand/preliminary examination and entering national stage.

9 – 10 am

PCT Strategies/National Phase

Location:

Old Georgetown/Congressional

Moderator:

Kim Dunn, *Emory University*

Speaker:

Brian Giles,
Thomas Horstemeyer LLC

See PCT Applications description (above)

10 – 10:30 am

Break

Location:

Meeting Room Foyer

10:30 am – Noon

National Phase and Filing in Foreign Jurisdictions

Moderator:

Kim Dunn, *Emory University*

Speakers:

Coco Bailey,
Thomas Horstemeyer LLC
Brian Giles,
Thomas Horstemeyer LLC

Following PCTs, this session will be directed towards processes and strategies for filing directly into the patent offices of foreign jurisdictions (via the Paris Convention), the similarities and differences between a direct file and a national stage application, managing costs/budgets, limitations of scope, claim strategies, voluntary amendments, examination and grant.

Noon – 1:30 pm

Location:

Lunch

Terrace

1:30 – 3 pm

Working with Internal and External Patent Counsel

Location:

Old Georgetown/Congressional

Speakers:

Caroline Chen,
University of Maryland
Keisha Hylton-Rodic,
Hylton-Rodic Law Firm

This session will cover into various structures used in technology transfer offices for managing their caseloads and how prosecution is handled. Whether your office uses internal counsel, external counsel, or some combination of the two, there will be tips and tricks for how to handle your portfolio. Speakers will discuss how they handle patentability searching, patent preparation, prosecution and inventorship determinations. Find out what experienced patent attorneys/agents consider the most difficult aspects of the process and how you can work with them to control costs and get a better and more time efficient product.

3 – 3:30 pm

Location:

Break

Meeting Room Foyer

3:30 – 5 pm

Working with Patent Counsel (continued)

Location:

Old Georgetown/Congressional

Speakers:

Caroline Chen,
University of Maryland
Keisha Hylton-Rodic,
Hylton-Rodic Law Firm

This session will focus on how different universities and technology transfer offices (TTOs) make the decisions regarding IP prosecution counsel. Learn about the roles and responsibilities of the licensing office, inventors, co-owners, licensees and counsel in order to establish an efficient and effective partnership. Panelists will discuss the structures of various TTOs and highlight the advantages/disadvantages associated with that structure. Billing, invoice approval processes and evaluation of counsel will also be discussed. The final portion of the session will be a small group discussion where best practices and tips and tricks can be shared by all.



IP Portfolio Management Agenda

Wednesday, October 30

7 – 8 am

Breakfast

Location:

Terrace

7 – 10:30 am

Registration

Location:

Meeting Room Foyer

8 – 10 am

Managing an Intellectual Property Portfolio

Location:

Old Georgetown/Congressional

Speakers:

Korie Counts, *Ohio University*
Jodie Richardson,
University of Michigan

So, you've spent the past few days learning about intellectual property and everything that goes along with it. Now how do you put it all together? This session is designed to help you connect the dots by providing a comprehensive overview of the process with our panel of experts who will provide tips and tricks.

10 – 10:30 am

Break

Location:

Meeting Room Foyer

10:30 am – Noon

Round Table Discussion on All Things IP

Location:

Old Georgetown/Congressional

Speakers:

IP Portfolio Committee

As a wind down to the course, come join the Intellectual Property Portfolio Management Committee and panel members for a round table discussion on whatever questions you may have related to IP portfolio management. A very casual get together with your peers for sharing ideas, thoughts, strategies and best practice.

10:30 am – 1 pm

Offsite Tour: USPTO Headquarters

Advanced registration is required. No onsite registration is available. The tour will consist of visiting the museum and the public search facility. The tour begins at 11:30 a.m. and ends at 1 p.m. Transportation will be provided.



New Can't-miss Training

Corporate Engagement Intensive Course

New Orleans BioInnovation Center

Dec. 9, 2019

The new Corporate Engagement Intensive Course uses a mix of instruction and panel discussions to maximize your learning and networking opportunities.

The course provides the fundamental background, skills and tools needed to incorporate a holistic corporate engagement mindset into your daily activities and office culture.

The full day agenda will include:

- **Corporate Engagement Overview and Life Cycle**
- **How to Do Your Homework**
- **Partnering On and Off Campus**
- **How to Do Follow-up**
- **Alliance Management**
- **Metrics and Communicating Your Success**

The Corporate Engagement Intensive Course directly precedes *Bio in the Bayou*, which is scheduled for Dec.10. Make the most of your ROI by attending both events.

Learn more about this course at www.autm.net/CorpEngagement19.



AUTM'S Antitrust Policy – What You Need to Know

AUTM has a policy of strict compliance with federal and state antitrust laws. The antitrust laws prohibit competitors from engaging in actions that could result in an unreasonable restraint of trade. Consequently, AUTM members must avoid discussing certain topics when they are together – both at formal association membership, Board, Cabinet, committee and other meetings and in informal contacts with other industry members. Please review AUTM's policy, www.autm.net/antitrust, and adhere to the following:

- **DON'T** discuss prices or fees for service, costs, discounts, terms of sale or credit, warranties, profit margins, individual companies' marketing or bidding plans, pricing policies, controlling sales, allocating markets, complaints related to specific customers, or refusals to deal.
- **DON'T** joke about antitrust compliance.
- **DON'T** speak or act on behalf of AUTM or any committees unless specifically authorized to do so.
- **DON'T** participate if you think something is improper.
- **DO** alert the AUTM Chair, CEO, or legal counsel to any concerns about competitively sensitive information.

Save the Date

Annual Meetings

2020

March 8 – 11
Manchester Grand Hyatt San Diego
San Diego, California

2021

March 14 – 17
Washington State Convention Center
Seattle, Washington

2022

February 20 – 23
Hilton New Orleans Riverside
New Orleans, Louisiana

2023

February 19 – 22
Austin, Texas
JW Marriott

2024

February 18 – 21
San Diego, California
San Diego Marriott Marquis

2025

March 2 – 5
Washington, DC
Gaylord National Resort &
Convention Center

Professional Development Courses

**Corporate Engagement
Intensive Course**

December 9
New Orleans BioInnovation Center
New Orleans, Louisiana