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[NON-CONFIDENTIAL WITHOUT SENSITIVE INFORMATION]

[**NTD:** A memorandum template to provide a **non-confidential summary of an IP strategy** is a valuable tool for communication, marketing, collaboration, legal compliance, and strategic planning. It allows companies to share their approach to IP management with various interest holders while protecting sensitive information.

Why is a non-confidential summary useful?

Investors often look for companies with a clear and robust IP strategy. A non-confidential summary can provide them with enough information to understand the company's approach to IP without disclosing sensitive details that could compromise competitive advantage.

When entering into discussions with potential partners or collaborators, a non-confidential summary can serve as a starting point for conversations about IP without the need for immediate non-disclosure agreements (NDAs). This can streamline the initial stages of negotiation and collaboration.

In some cases, regulatory bodies may require a summary of the company's IP strategy as part of compliance or reporting requirements. A non-confidential summary can fulfil these requirements without exposing sensitive information.

If more detail is requested then the parties can enter into an NDA before confidential, sensitive information is shared.

A memorandum template facilitates this communication by ensuring consistency, clarity, efficiency, comprehensiveness, and proper documentation.]

[Company Letterhead]

[Date]

Subject: Intellectual Property Strategy for [Company Name]

This report provides a non-confidential summary of the company's intellectual property (IP) strategy. This strategy outlines the approach the company takes to protect, manage, and leverage its intellectual property assets to support business objectives and maintain a competitive edge in the market.

1. **Overview of current portfolio IP registrations/publications***
   - **Patents**: [Number] patents granted, [Number] publications pending.
   - **Trademarks**: [Number] registered, [Number] publications pending.
   - **Copyrights**: [Number] registered, and [general description of works].
   - **Unregistered IP**: [Brief description of core unregistered brand and copyright assets. Do not disclose trade secrets and confidential information].

   *does not include confidential/unpublished applications, and does not include trade secrets

Provide a high-level assessment of the strength and breadth of the IP portfolio, and its ability to protect key innovations and market positions.

2. **IP strategy**
   - **IP audit**: Regular audits of existing IP assets to identify gaps and opportunities for new IP creation.
   - **Identification and protection**: Culture of innovation within the company by incentivising and recognising employee contributions to our IP portfolio. Process to proactively identify new IP assets and protect with IP filings.
   - **Filing strategy**: Prioritise filings in key markets and technology areas that align with our business objectives.
   - **Policies and training**: Internal policies and procedures for IP management, including employee training and awareness programs.

Example mapping of non-confidential IP to core products
Example employee incentives, including any key inventors/designers

3. **Commercialization and enforcement**
   - **Collaboration**: Explore opportunities for collaboration with universities, research institutions, and other companies to enhance our IP portfolio.
   - **Licensing**: Leverage our IP assets to generate revenue through licensing, partnerships, and strategic alliances.
   - **Monitoring and surveillance**: Proactively monitor market to address potential infringements and protect our market position.
   - **Risk management**: Mitigate risks associated with IP infringement and comply with relevant laws and regulations, and usage of third party IP.

Examples of non-confidential licensing, partnerships, and strategic alliances
[NTD: litigation related activities can be particularly sensitive to disclosure so please consult counsel on how such activities should be described.]

Next Steps: ***Clear, actionable request for the reader to consider***

We are excited about the potential of our IP strategy to drive sustainable growth and create long-term value. If you require further information regarding our IP strategy then we will need a confidential agreement in place. Please let us know if this is desirable and we can engage on next steps.

Yours sincerely,