

**2:00PM – 4:00PM**

**A Primer for Tax and Estate Planning Practitioners on How to Read and Search for Patents**

In recent years, the US Patent and Trademark Office has granted patents with respect to tax and estate planning strategies. As these patents proliferate, tax practitioners will need to consider the advisability of conducting patent searches and to evaluate whether claims made in tax-related patents are relevant in advising clients. This program is designed to provide the tax or estate planning practitioner with the basic background needed to read a patent and to search the patent database to determine whether any particular planning strategy has been patented.

*Moderator:* Professor Michael B. Lang, Chapman University School of Law, Orange, CA.

*Panelists:* Karen Lehman, Scientific and Technical Information Center, US Patent and Trademark Office, Alexandria, VA

Vincent Millin, Supervisory Patent Examiner (Finance), US Patent and Trademark Office, Alexandria, VA

Professor John R. Thomas, Georgetown University Law Center, Washington, DC

Charles F. Wieland III, Buchanan Ingersoll & Rooney PC, Alexandria, VA

*Sponsored by:* Task Force on Patenting Tax Strategies