



COLLEGE OF PATENT  
AGENTS & TRADEMARK AGENTS

COLLÈGE DES AGENTS DE BREVETS ET  
DES AGENTS DE MARQUES DE COMMERCE

# Annual Report

## 2023

*Building for accessible and competent patent  
agent and trademark agent professions.*

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**Ruth McHugh** | Chair

## Message from the Chair of the Board

I was honoured to become Chair of the CPATA Board in May 2023, having been a Director since the College was established in 2019 as an important initiative under Canada's Intellectual Property Strategy, with a significant mandate to help establish Canada as a leader in generating and strategically leveraging IP investments.

Witnessing CPATA's evolution from an organization with no start-up funding to a modern, best-in-class regulator has been deeply satisfying. The CPATA Board maintains an unrelenting focus on the public interest and an unparalleled dedication to enhancing the patent agent and trademark agent professions as the highest quality IP support for Canadian innovators and creators.

CPATA is progressing from its start-up phase toward long-term regulatory sustainability. The organization is now staffed with a permanent CEO, a talented and dedicated team, a fully constituted Board of Directors, and five Committees working diligently to execute its mandate under the College of Patent Agents and Trademark Agents Act. CPATA is grateful to the many patent agent and trademark agent professionals who advise and assist in a variety of areas from setting exams to considering complaints.

In the short time since CPATA's coming into force in June 2021 we have built the foundations for a world-class regulator of intellectual property professionals and have focused on impactful initiatives in the areas of professional competency, entry to practice, and complaints, discipline and unauthorized practice.

I am excited for the future and the key role CPATA will play in the Canadian innovation ecosystem.

A handwritten signature in black ink, consisting of the initials 'RMC' in a stylized, cursive font.



**Juda Strawczynski**

**CEO and Registrar**

## Message from the CEO and Registrar

When I joined CPATA in January of 2023 as the College's first permanent CEO, I was honoured to take on the role at such an important moment in CPATA's development and at a time when access to patent agents and trademark agents who help protect intellectual property rights for innovators is more important than ever. I joined a small and agile organization that works relentlessly to modernize the regulation of patent agents and trademark agents for the benefit of all Canadians with the goal of increasing access to these expert professionals.

Building on the strong foundations established by a Board and staff with an ambitious future vision of intellectual property public interest regulation, 2023 included many key steps, including:

- 1. Professional Competency and Entry to Practice:** Our newly established competency frameworks, approved by the Board in 2023, are instrumental in defining the professions and facilitating access to them. With clear standards, CPATA will be able to align entry to practice requirements with these necessary proficiencies, starting with the new qualifying examinations which will be administered in 2024 for the first time.
- 2. Complaints, Discipline and Unauthorized Practice:** 2023 was an inaugural year for CPATA as we held our first discipline hearing and handled our first allegations of unauthorized practice. Our principled, proactive and proportionate approach to professional regulation reduces the risk of harm to the public.
- 3. Sustainable Regulation:** Taking forward-thinking steps towards financial sustainability, CPATA introduced new categories of licences and fee structures that balance building frameworks to enhance access to competent patent and trademark agent professionals with the costs of regulation.

As we continue this journey, let us remain steadfast in our dedication to excellence, innovation, and serving the needs of Canadians while we shape the future of the patent agent and trademark agent professions.

A handwritten signature in black ink, appearing to read 'Juda A.', written in a cursive style.

# About CPATA

*CPATA is the independent public interest regulator of patent agents and trademark agents in Canada.*

## What we Do

*CPATA oversees all aspects of regulating the patent agent and trademark agent professions, including:*

- setting competency standards for patent agents and trademark agents;
- developing and administering defensible qualifying examinations and entry-to-practice requirements;
- implementing the Code of Professional Conduct that applies to all agents;
- managing a Public Register of all licensees and Foreign Practitioners;
- creating professional regulatory systems to address complaints against licensees and with respect to unauthorized practice;
- establishing expectations for professional liability insurance, continuing professional development and pro bono requirements; and,
- promoting innovation in the delivery of patent and trademark services.

## Our Vision

*Public access to a globally-respected body of patent agents and trademark agents who are highly skilled, ethical and current in their knowledge.*

## Our Regulatory Objectives

- 1.** Protect and promote the public interest in patent and trademark services.
- 2.** Protect those who use patent and trademark services.
- 3.** Promote innovation in the delivery of patent and trademark services and the protection of intellectual property rights.
- 4.** Improve access to, and promote competition in the provision of, patent and trademark services.
- 5.** Promote the independence of the patent and trademark professions.
- 6.** Oversee the ethical and competent delivery of patent and trademark services by licensees.
- 7.** Promote equity, diversity and inclusion in the patent and trademark professions and in the delivery of patent and trademark services.

## A Portrait of the Patent Agent and Trademark Agent Professions in Canada

CPATA is committed to facilitating public access to expert IP services from a robust body of highly competent and ethical professionals.

Registered patent agents and trademark agents serve the public by providing highly specialized legal services which allow innovators and creators to protect their intellectual property in Canada.

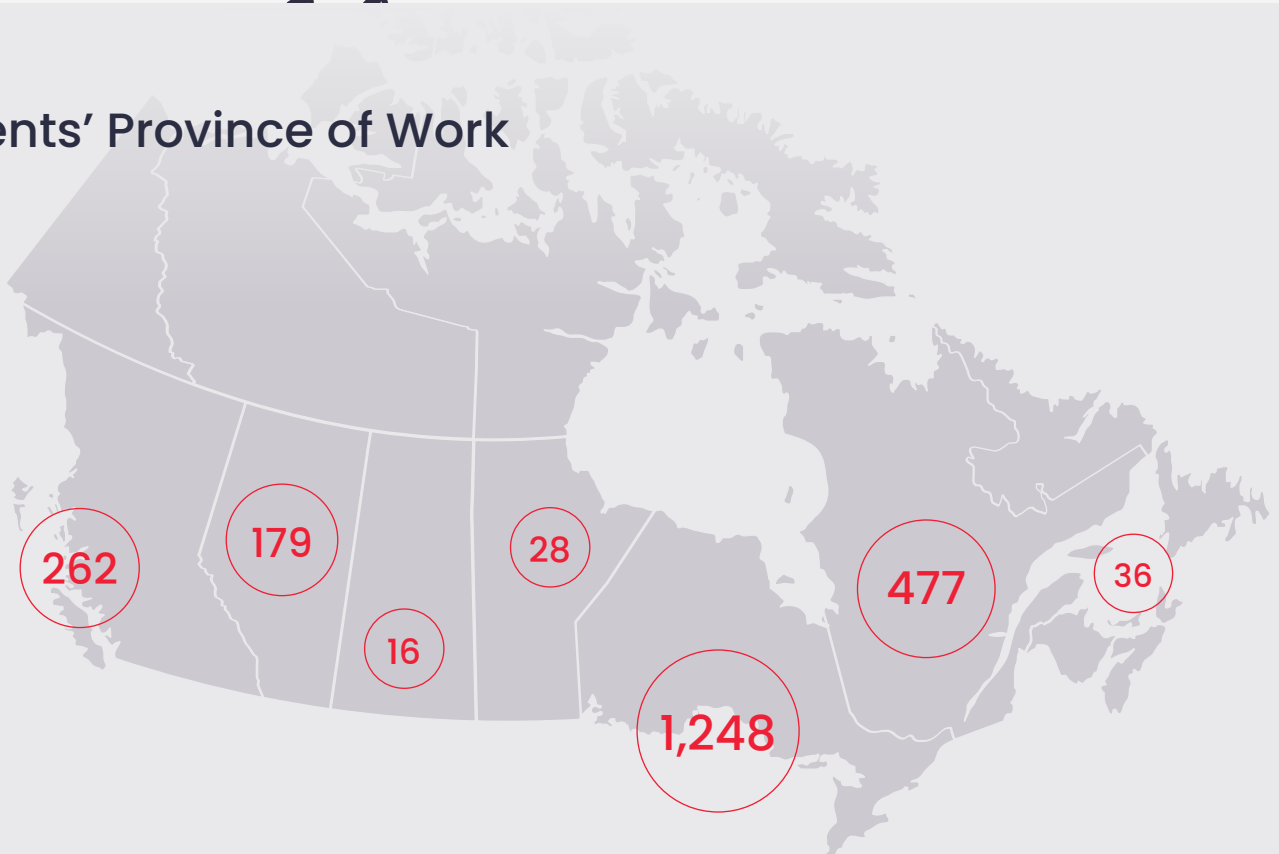
The expertise of our licensees is instrumental in ensuring that Canada reaps the benefits of an innovation-driven world economy.



# 2246

## Agents in Canada

### Agents' Province of Work



## CPATA's Licence Classes

**Class 1** licensees have full practice rights, including presenting and prosecuting before CIPO.

**Class 2** licensees have restricted practice rights. They can do everything that a Class 1 agent can do with the exception of presenting and prosecuting before CIPO. Coming into effect with CPATA's new By-laws on May 1, 2023, modifications were made to this licence class to allow for better integration of IP experts into in-house environments.

**Class 3** licensees are agents-in-training, working under the supervision of an agent or CIPO representative. These licensees are permitted to appear before and communicate with CIPO under the supervision of their approved Training Supervisor.

**Class 4** licensees are inactive or non-practising, whether temporarily or permanently. This new licence class came into effect with CPATA's new By-laws on May 1, 2023.

### Patent Agents



**881** Class 1 Licence  
Active Agent



**37** Class 2 Licence  
Restricted Agent



**166** Class 3 Licence  
Agent-in-training



**65** Class 4 Licence  
Inactive Agent

### Trademark Agents



**1,256** Class 1 Licence  
Active Agent



**67** Class 2 Licence  
Restricted Agent



**140** Class 3 Licence  
Agent-in-training



**102** Class 4 Licence  
Inactive Agent

**468** licensees hold both a patent agent and a trademark agent licence

### In 2023



**95** licences  
administratively  
suspended



**52** licences  
surrendered



**17** licences  
reinstated



## Board of Directors

CPATA's Board of Directors consists of five non-licensee Directors appointed by the Minister of Innovation, Science and Industry and four licensee Directors elected by the professions. The combined governance and intellectual property experience and expertise of Directors contributes to building CPATA as a best-in-class regulator.

### Appointed Directors



**Ruth McHugh** | *Chair Alberta*

- Experienced international corporate director, advising and serving on boards with a global focus at the nexus of innovation, regulation and governance.
- Board Chair, CPA Alberta; Board Member, Innovation Asset Collective and Alberta Innovates
- Served as COO of the Office of the Auditor General of Alberta and led executive oversight of Alberta's Legislative Assembly Office



**Iris Almeida-Côté** | *Quebec*

- CEO at INNOVACONNECT Inc., previously CEO – The Royal Society of Canada; President and CEO – Canadian Pension and Benefits Institute; President and CEO – Canada World Youth
- Corporate Director (ICD.D/IAS.A), Desjardins Bank, Vice-President, (Caisse Lac Memphremagog), Audit and Risk and the CEO Performance Review and Compensation committees
- Chair, Canadian Space Agency, Departmental Audit Committee (DAC)
- Member, Citizenship and Immigration Canada, DAC



**Karima Bawa** | *British Columbia*

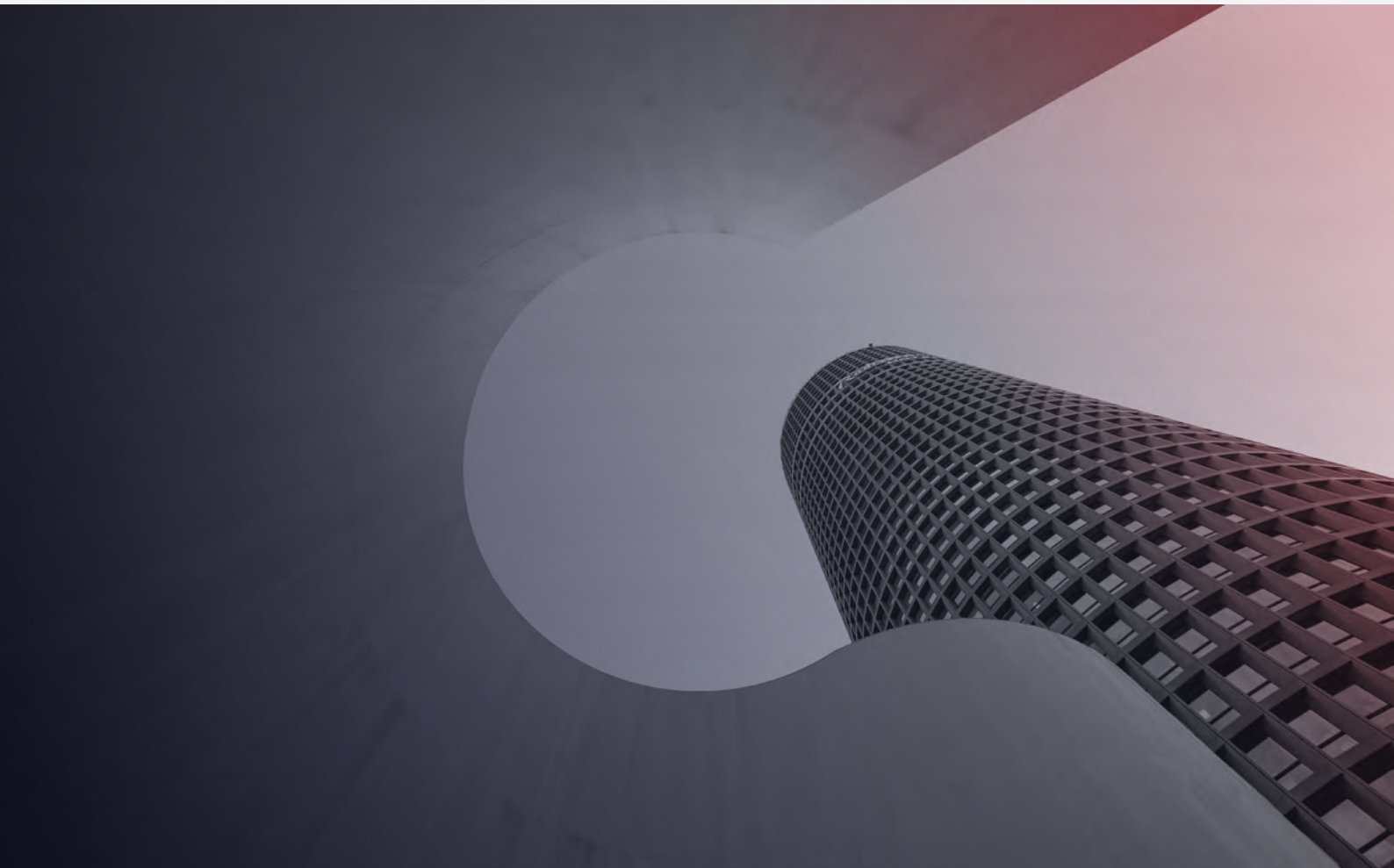
- Chair of Intellectual Property Ontario; Senior fellow with the Centre for International Governance Innovation (CIGI)
- Former Chief Legal Officer and General Counsel at Research In Motion (BlackBerry)
- Co-created a Foundations in Intellectual Property open online course and co-author of the Intellectual Property Guide

**Amber Batool** | *Ontario*

- Executive Director, Strategic Advisory Group, Global Investment Banking at CIBC
- Has held executive positions in oil and gas, the public sector and in cleantech, including as the corporate lead on developing IP strategy
- Worked for the UK Prime Minister's Strategy Unit, the Cabinet Office and as a Chief of Staff to several Cabinet Ministers

**Thomas G. Conway** | *Ontario*

- Past President of the Federation of Law Societies of Canada; Former Treasurer of the Law Society of Ontario
- Recipient of the Law Society of Ontario LLD (hon. causa) for his contributions to regulating the legal professions in Canada and to the cause of access to justice
- Recipient of the Carleton Medal awarded by the County of Carleton Law Association to a lawyer most deserving of recognition for great diligence, high ideals and outstanding leadership in the practice of law throughout their career



## Elected Directors



### **Andrew Currier** | Patent Agent Director *Ontario*

- Patent agent (Canada, USA), trademark agent (Canada), professional engineer (Ontario) and lawyer (Ontario)
- CEO of PCK Intellectual Property, a specialist patent and trademark firm
- Co-author (with Stephen Perry) of *Canadian Patent Law* (5th ed. LexisNexis, 2024)
- Former General Counsel for a publicly-traded flat-panel display company, IP counsel for a Silicon Valley start-up



### **Jeffrey Astle** | Patent Agent Director *Quebec / Ontario*

- Retired patent agent, trademark agent, U.S. patent agent and lawyer (QC/ON)
- Former Associate General Counsel – Intellectual Property for Pratt & Whitney Canada Corp. (1994-2021)
- Fellow and Past President of the Intellectual Property Institute of Canada (IPIC)



### **Brigitte Chan** | Trademark Agent Director *Quebec*

- Trademark agent, lawyer and Head of Bereskin & Parr's Montreal Office
- Recipient of the Order of Merit, University of Ottawa Civil Law Section, 2021
- Member of the Advisory Board of the 2022 and 2021 Canadian General Counsel Awards, presenting the Bereskin & Parr Diversity Award



### **Leonora Hoicka** | Trademark Agent Director *Ontario*

- Patent agent, trademark agent and lawyer (ON/NY); IP commercialization mentor for Intellectual Property Ontario
- Former Associate General Counsel, Intellectual Property, and Chief Trademark Counsel for IBM Corp, NY (2008-2020)
- Recipient of the Member of Distinction award (2022) and Past President of the Intellectual Property Institute of Canada (IPIC)

## Committees

*CPATA's five committees play a vital role in regulatory initiatives and help CPATA achieve its public interest and public protection mandate.*

### Governance Committees

These committees assist the Board in fulfilling its governance and fiduciary responsibilities.

#### Governance Committee

This committee assists the Board in fulfilling its governance responsibilities, including promoting an orderly and effective succession of Directors and committee members. It also oversees Board, committee, and CEO evaluations and develops and recommends approval of the Board's governance policy framework.

**Karima Bawa** – *Chair*

**Amber Batool**

**Peter Cowan**

**Leonora Hoicka**

#### Audit & Risk Committee

To assist the Board in fulfilling its fiduciary obligations and responsibilities to both the public and its licensees, this committee supports matters of financial planning, auditing, financial reporting, systems of corporate control and risk management.

**Bob Plamondon FCPA** – *Chair*

**Jeff Astle**

**Iris Almeida-Côté**

**Maureen Rogers**

## Regulatory Committees

These committees operate with a high level of independence in terms of decision-making and are accountable to the Board for creating and adhering to fair and effective policies and procedures that support CPATA's Regulatory Objectives.

### Registration Committee

Composed of representatives from the Patent Office, Office of the Registrar of Trademarks, licensees and members of the public, this committee assists the Registrar in administering CPATA's licensing requirements, including conducting registration hearings.

**Tina McKay** – *Chair*

**Heidi Jensen**

**Jeffrey Orser**

**Mark Piro**

**Hilary Rose**

**Natalie de Paulsen**

**Martin Béliveau** (*until August 2023*)

**Jason Hynes** (*until September 2023*)

### Investigations Committee

To support competent and ethical patent and trademark services across Canada, this committee investigates and resolves or dismisses complaints, educates licensees where appropriate, and refers matters to the Discipline Committee where there is clear evidence of professional misconduct or incompetence.

**Kristin Dangerfield** – *Chair*

**Pierre Cantin**

**Sanjay Goorachurn**

**Barb Murchie**

**Herman Van Ommen**

### Discipline Committee

Members serving on the Discipline Committee support CPATA's public protection mandate by hearing applications referred by the Investigations Committee and ruling on complaints of professional misconduct and/or incompetence.

**Marcel Mongeon** – *Chair*

**Raj Anand** – *Vice Chair*

**Charles Boulakia**

**Jean Whittow**

**Susan Boulter** (*starting September 2023*)

**Guy Joubert** (*starting September 2023*)

**Sam Lanctin** (*starting September 2023*)

**Kathleen Lickers**

**Jay Sengupta**

**Benoit Yelle**

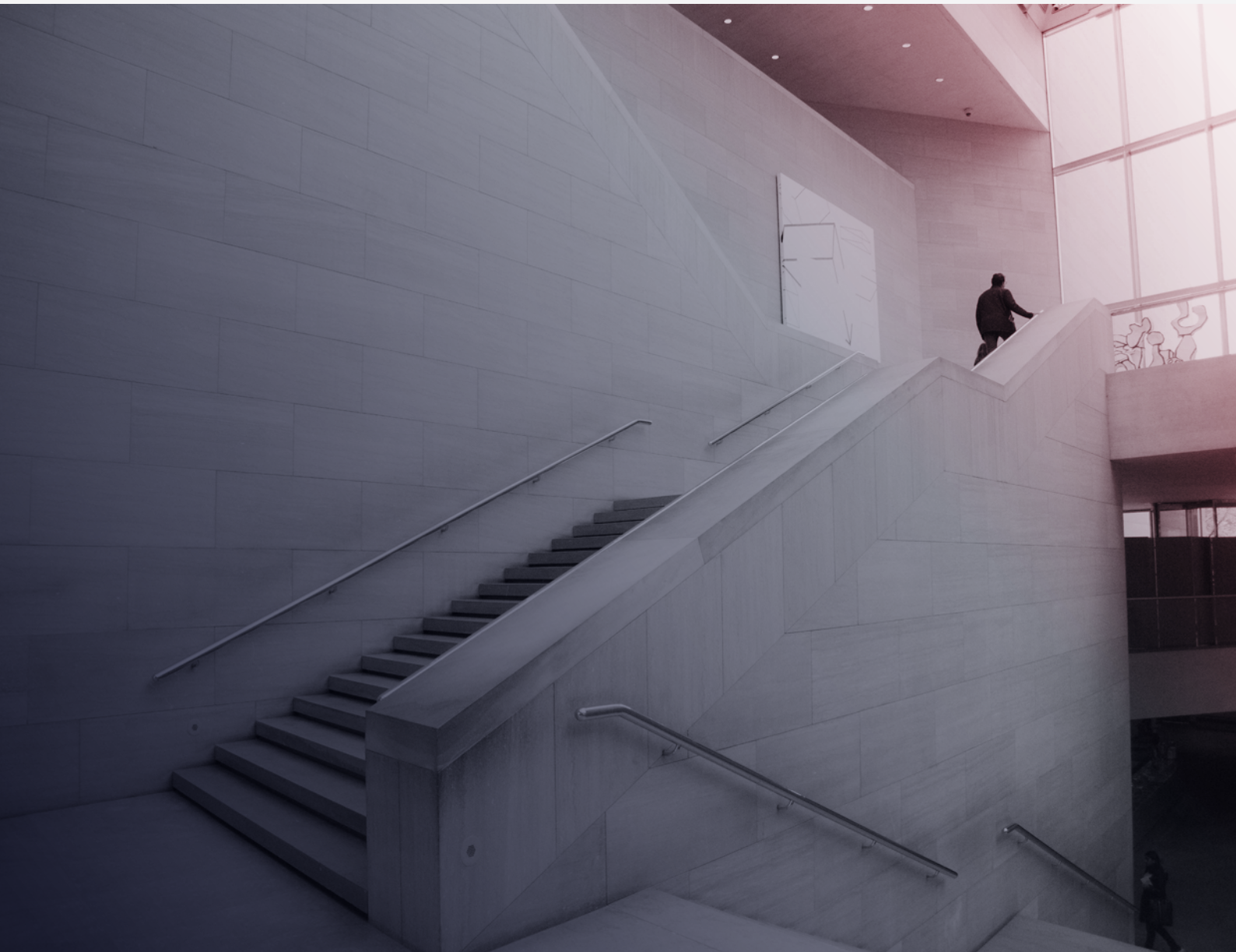
# Professional Competency and Entry to Practice

*CPATA sets entry to practice and competency standards for the patent agent and trademark agent professions, facilitating access to qualified intellectual property expertise for Canada's innovators and creators.*

## Technical Competency Profiles

For many years, there was no clearly-defined overview of what agents must be able to do to practice competently. The Technical Competency Profiles for Patent Agents and Trademark Agents was adopted by CPATA's Board of Directors on March 2, 2023, creating an unprecedented clear description of the knowledge and skills licensees need to provide competent services to their clients. The profiles were developed through a rigorous process that allowed for input from agents and other IP stakeholders, including through working groups of licensees and a survey of the entire professions.

Clear expectations for practitioners protect the public interest by providing the framework through which all new and current licensees can develop and maintain the skills necessary to competently serve their clients. These profiles will also serve as a cornerstone for the redevelopment of the qualifying examinations.





## Qualifying Examination Redevelopment

*CPATA began redeveloping the qualifying examinations for 2024, aligning them with the new Technical Competency Profiles and bringing important improvements to entry to practice which will ultimately benefit Canadian consumers of IP services.*

When CPATA was created as the independent public interest regulator of patent agents and trademark agents, it assumed responsibility for setting and administering the qualifying examinations that are part of the entry to practice requirements for patent agents and trademark agents. At that point, entry to practice requirements, including the exams, had remained largely unchanged for many years and concerns were raised by some within the IP community about this framework due to low pass rates.

CPATA began a review based on the principles of transparency, fairness, defensibility and ability to prepare agents in training for future practice. Over 50 licensees contributed their knowledge and expertise to the exam redevelopment. Starting in 2024, the Qualifying Examinations to become a patent agent or a trademark agent will be divided into the Knowledge Examinations (to assess basic technical knowledge competencies) and the Skills Examinations (to assess the application of that knowledge). Candidates must pass the Knowledge Exams to be eligible for the Skills Exams. The development and approval of the Test Specifications and methodologies for standard-setting were also approved by the Registration Committee in 2023, bringing increased defensibility and rigour to the examination process.



## Qualifying Examination Administration

*Incremental improvements to the Patent Agent Qualifying Examinations and the Trademark Agent Qualifying Examinations have resulted in more competent practitioners entering the profession, thereby increasing the availability of IP expertise in the market.*

Each year, CPATA administers the Qualifying Examinations, the final step in the entry-to-practice pathway before Class 3 agents in training can become fully active Class 1 practitioners. Although 2023 was the last year of the legacy examinations prior to the launch of the new examinations, CPATA nonetheless made several improvements to the exams. The new Technical Competency Profiles allowed trainees to better understand what competencies the exams would be testing in order to prepare for the test. There was greater standardization of test content and marking guides were improved.

Generally speaking, the pass rates on the qualifying examinations have increased year-over-year since CPATA's coming into force. The average first-attempt pass rate on the Patent Agent Qualifying Examination from 2013–2020 was **5%**, and the average overall pass rate was **24%**. Since CPATA's coming into force, the first-attempt pass rate increased to **22%**<sup>1</sup> and the average overall pass rate increased to **33%**. Similarly, the average pass rate on the Trademark Agent Qualifying Examination from 2013–2020 was **28%**. Since CPATA's coming into force, the average pass rate on that exam has increased to **45%**. Appropriate testing ensures that individuals who have the required competencies are not held back from entering the professions, thereby increasing the pool of available practitioners for innovators and creators.



### Class 3 Agents in Training who Passed the Qualifying Examinations in 2023

35

Class 3 trademark agents

46

Class 3 patent agents

<sup>1</sup> In 2021, the first-attempt pass rate was 8% (27 writers); in 2022 it was 10% (29 writers); and in 2023 it was 47% (17 writers).



# Protecting the Public

*Through proactive ethics education and a fair and open complaints and discipline process, CPATA bolsters public confidence in the services of patent agents and trademark agents and protects Canada's innovators and creators.*

## Ethics Education

Instead of depending exclusively on a complaints and discipline process to address harms after the fact, CAPTA takes a proactive approach to educating licensees on their ethical obligations under the Code of Professional Conduct.

### How our Ethics Inquiry and Analyses Process Works

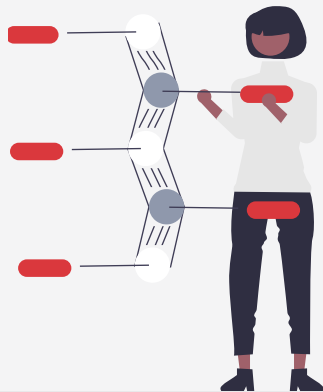
1 An agent contacts CPATA with a question about their ethical obligations

2 CPATA provides ethical guidance on a case-by-case basis to that agent

3 Based on the questions received, we develop articles to educate other licensees

4 Licensees read articles in the monthly newsletter and on the website

5 We learn of challenges relating to the current Code of Professional Conduct and consider future areas for clarification or amendment



**29**  
ethical inquiries  
addressed

**12**  
articles published providing  
ethical guidance

### Example Inquiries

*What are my obligations when my client has disappeared or died?*

*What am I permitted to do as a non-agent IP lawyer or as a Class 2 agent?*

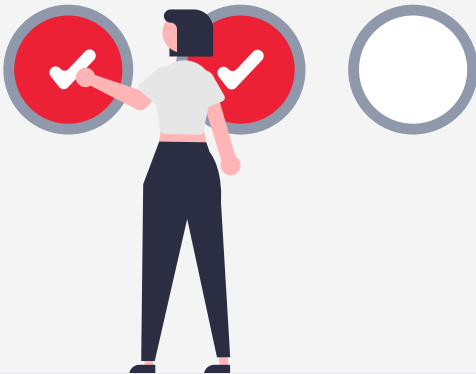
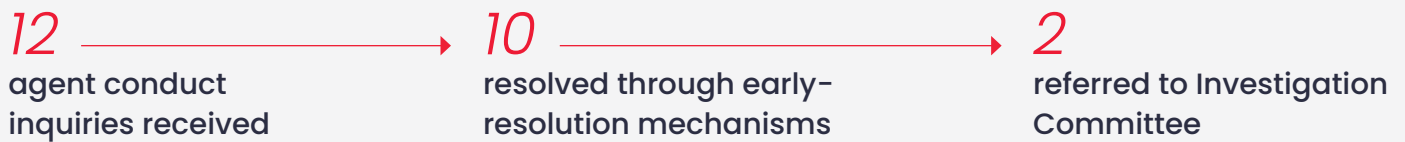
*How do I protect client privilege when applying for funding from the government or third parties?*

## Complaints, Discipline and Unauthorized Practice (UAP)

CPATA protects innovators and creators by addressing concerns and complaints regarding licensees and individuals engaging in unauthorized practice.

In November, CPATA held its first discipline hearing, which was held online and open to the public, in line with principles of transparency, accessibility and cost-effectiveness. CPATA also addressed its first allegations of unauthorized practice, with successful early interventions.

### In 2023



- CPATA held its first discipline hearing
- CPATA addressed its first allegations of unauthorized practice

### Agent Conduct Inquiry themes

*My agent did not provide good quality of service and charged unfair fees*

*My agent has disappeared and held money in trust*

*The firm I just left isn't acting ethically in managing my departure with clients*

### Complaints and Discipline

3 | New Investigations

2 | Carried over from 2022

2 | Notices of application

1 | Judicial review ongoing since 2022

## Unauthorized Practice (UAP)

Concerns with unauthorized practice range from allegations of agency practice being conducted without any agents involved, misleading information in advertising or marketing and non-agents holding themselves out as agents. In each case, a public protection and risk-focused lens is applied to evaluate whether some form of follow-up or action is appropriate. Each case is investigated, and in most cases written warnings and requests or demands for rectification result.

### 14 UAP complaints

#### Complaint Types

#### Resolutions

**6** | Suspended licensees still holding themselves out as agents online

**8** | Unauthorized practice by non-licensees

**3** | Resolved with warnings and rectification

**4** | Written warnings or advice

**1** | Insufficient information to pursue

**6** | No further action



## Professional Liability Insurance

*Starting in 2023, all practicing agents who serve the public were required to have professional liability insurance that meets CPATA's requirements, adding an additional layer of protection for the clients of licensees and licensees themselves.*

Mandatory professional liability insurance for practicing agents protects the public in situations where errors and omissions on the part of an agent result in financial loss for clients. CPATA continued discussions with law society insurance providers to align requirements and reduce costs and burden to licensees who are also lawyers. As a result, in all provinces except Alberta and Ontario, coverage granted by provincial and territorial law societies now meets CPATA's requirements.

# Continuing to Build Relationships

*In addition to the relationships we foster with the public and licensees daily, we engage with other professional regulators and IP stakeholders to share knowledge, collaborate and play our role in supporting Canada's innovation sector.*

## Collaborating and Sharing Knowledge

*In 2023, CPATA continued to build relationships in Canada's innovation sector and within the intellectual property community.*

Building relationships with other stakeholders in the intellectual property space in Canada is a key priority for CPATA. Connections with the federal government, provincial organizations supporting IP, intellectual property associations, educational institutions, and other regulators will be essential for CPATA to accomplish its mandate. In 2023, we focused on showing leadership and strengthening our partnerships within the IP space.



*CEO and Registrar Juda Strawczynski, presented on and answered questions about CPATA's continuing development at the Intellectual Property Institute of Canada (IPIC)'s annual conference.*



*CPATA's Director of Registration and Education, Deputy Registrar Jen Slabodkin, presented at the Canadian Network of Agencies for Regulation, sharing insights into building a modern right-touch regulator.*



# Sustainable Independent Regulation

*As an independent regulator, CPATA supports the innovation sector and overall economy in Canada through long-term, sustainable regulation. CPATA is self-funded through fees paid by licensees and comes at no cost to the Canadian government or taxpayers.*

## 2023–2025 Strategic Plan

*In May, the Board of Directors approved CPATA's first Strategic Framework for 2023–2025, which outlines CPATA's priorities as we transition from a new regulator to a maturing organization.*

CPATA's first Strategic Framework ensures that CPATA focuses on initiatives that are essential to accomplishing our public protection mandate. During this phase, we will complete the start-up build of our regulatory infrastructure and concentrate increasing resources on professional development and competency and professional regulation initiatives. This will include the redevelopment of the qualifying examinations, an evaluation of current licensing paths, an exploration of potential alternatives for entry-to-practice and a policy regarding continuing professional development. Another focus will be on core elements of professional regulation, such as further development of our complaints and discipline experience through case management, the provision of education on and fine-tuning of the Code of Conduct, support of the continued evolution of patent agent and trademark agent privilege and the monitoring and addressing of unauthorized practice. These elements of professional regulation will support the rigour and sophistication of the patent agent and trademark agent professions and will increase public confidence in the IP services they provide.

# 2023–2025 Strategic Framework

## Professional Development & Competency

- Create Technical Competency and Professional Foundations Profiles
- Develop new Qualifying Examinations
- Explore current and potential licensing paths
- Consider Continued Professional Development approaches

## Professional Regulation

- Educate licensees on the Professional Code of Conduct and update the Code
- Address complaints about licensees and instances of unauthorized practice
- Support the continued evolution of agent privilege

## Outreach, Infrastructure & Governance

- Foster relationships and work collaboratively with IP stakeholders
- Build necessary regulatory infrastructure
- Develop approaches to equity, diversity and inclusion and indigenous reconciliation
- Govern in a fiscally responsible manner

[Read Full Strategic Framework](#)

## Financial Sustainability

*In 2023, CPATA focused on achieving financial sustainability.*

CPATA worked with a start-up budget during its first years of operation and began moving towards scale-up activities in 2023. As we started to investigate early complaints against licensees, we needed to consider allocating additional funds towards potential complex future investigations and hearings. Similarly, our work on the new qualifying examinations and additional competency initiatives signalled the need for increased investments in these key regulatory areas. In 2023, CPATA sustained a small operating loss, which was covered by reserves. Like all fiscally responsible regulators, CPATA needed to start planning for operational reserves and financial sustainability and took measures to adjust licensing fees for 2024 and beyond, to ensure long-term viability.

## Financial Reports

The financial information presented below is an extract from CPATA's 2023 audited annual Financial Statements. The full set of audited Financial Statements and a report on Board of Directors and Committee Member remuneration and expenses for 2023 are available at [www.cpata-cabamc.ca/financial-reports](http://www.cpata-cabamc.ca/financial-reports).

### CPATA's Financial Position

	<b>December 31, 2023</b>	<b>December 31, 2022</b>
Assets	\$ <u>490,942</u>	\$ <u>534,933</u>
Liabilities	\$ <u>198,644</u>	\$ <u>230,050</u>
Unrestricted net assets	\$ <u>292,298</u>	\$ <u>304,883</u>
Liabilities and net assets	\$ <u>490,942</u>	\$ <u>534,933</u>

### CPATA's Operations and net assets for the years

	<b>2023</b>	<b>2022</b>
Revenues	\$ <u>2,206,525</u>	\$ <u>2,354,059</u>
Expenditures	\$ <u>2,219,110</u>	\$ <u>2,294,193</u>
(Deficit) excess of Revenues over expenditures	\$ <u>(12,585)</u>	\$ <u>59,866</u>
Net assets, beginning of the year	\$ <u>304,883</u>	\$ <u>245,017</u>
Net assets, end of the year	\$ <u>292,298</u>	\$ <u>304,883</u>

## Revenue Notes

- Licence Fees for patent agents and trademark agents received in 2023 was lower than 2022 as there were ninety-four fewer Class 1 agents compared to the prior year. More than 250 Class 1 agents transferred to Class 4 (“inactive” or “non-practicing”) during 2023.
- Exam Fees relates to the patent and trademark qualifying examinations. There were fewer candidates in 2023 as a number of agents decided to wait for the new qualifying examinations in 2024.
- The number of renewals, applications for agents to change classes and requests for certificates of standing appear to be stabilizing as compared to 2022.
- CPATA was able to earn investment income in 2023 generated from a short-term guaranteed investment certificate (G.I.C.).

## Expenditure Notes

- Salaries and benefit costs increased in 2023 as CPATA rounded out the team (total of six employees) by hiring a new CEO and annualized costs for staff hired in 2022.
- Board and committee expenses increased slightly in 2023 as this was the first year with fully-constituted committees and the remuneration of Board and committee members was updated in CPATA’s new By-laws.
- Communications and stakeholder relations expenses decreased substantially from the previous year as 2022 involved a number of contracts that ended during that year.
- Human resource and recruitment costs have decreased from the prior year as 2022 costs were related to the recruitment and hiring of committee members and CPATA employees.
- Legal fees decreased from the prior year as CPATA finished a number of projects in 2022 and started to incur discipline and complaints related investigations and hearing fees.

# Looking Forward to 2024

*CPATA's focus in 2024 will continue to be on professional competency and entry-to-practice. CPATA continues to work towards strengthening the competencies of patent agents and trademark agents, and building confidence in accessible, ethical and expert intellectual property services in Canada.*

## Looking Forward to 2024

CPATA will administer the **new qualifying examinations** for the first time in 2024. This would not be possible without the over 70 patent agents and trademark agents who will serve on various working groups for the exam redevelopment and administration. As a complement to the Technical Competency Profiles developed in 2023, we will develop a **Professional Foundations Profile** that outlines the professional skills (such as communication and file management) that must complement a licensee's technical knowledge.

CPATA will also begin undertaking an **analysis of the current pathway to become an agent**: completing a 24-month training period and passing the qualifying examinations. We will be exploring the strengths and challenges within the current framework to see if improvements could be made to the system for potential licensees and their supervisors, and to consider whether additional pathways to licensure might benefit Canada.

Finally, CPATA will continue **building our regulatory infrastructure** including populating various roles on our committees and holding an election for two positions on the CPATA Board of Directors.

We look forward to working with our licensees and other stakeholders on these exciting and important projects in 2024.







COLLEGE OF PATENT  
AGENTS & TRADEMARK AGENTS

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COLLÈGE DES AGENTS DE BREVETS ET  
DES AGENTS DE MARQUES DE COMMERCE

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[Contact Us](#)

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