



# Annual Report | 2024

*Regulating Canada's patent agents and  
trademark agents in the public interest.*

[cpata-cabamc.ca](https://cpata-cabamc.ca)

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# Message from the Chair of the Board

Ruth McHugh | Chair

I was appointed to the inaugural CPATA Board in 2019, before the College came into force, and become Chair of the Board in 2023. Executing on a broad and innovative mandate to regulate Canadian patent agents and trademark agents in the public interest, CPATA has developed from a start-up organization with no funding to a contemporary best-in-class professional regulator.

CPATA plays a vital role in Canada's innovation ecosystem as it carries out its regulatory mandate under the *CPATA Act* and supports the evolution of the patent and trademark professions. This requires the right level of resourcing and in 2024 the budgeting process incorporated an evolving understanding of the cost of regulation. This means that when issues arose, such as an extensive scam targeting IP rightsholders in Canada, CPATA was ready and equipped to take action.

On behalf of CPATA's Board of Directors, we commit to responsibly continuing to build CPATA's capacity to successfully fulfill our regulatory mandate and help drive Canadian innovation.

A handwritten signature in black ink, consisting of stylized initials 'R' and 'M' followed by a long, sweeping horizontal line.



# Message from the CEO and Registrar

Juda Strawczynski | CEO and Registrar

With 2024 drawn to a close, I look back on the highlights that defined CPATA over the past twelve months. The year was filled with both new initiatives and continued progress, as we advanced important priorities from our 2023–2025 Strategic Framework. It amazes me how much can be accomplished in one year by a small, agile regulator.

- 1. We launched new qualifying examinations.** The new exams, which test whether candidates have acquired the knowledge and skills outlined in the new competency profiles that set out what we can expect from patent agents and trademark agents, represent an important advance in entry-to-practice requirements for the profession.
- 2. We began to review the pathways to becoming an agent.** Through a broad consultation, CPATA collected information from licensees and other IP stakeholders about their experiences with and insights about apprenticeships, with the goal of understanding the merits and challenges of the current model.
- 3. We tackled unauthorized practice and fraud.** CPATA responded swiftly and robustly to a rampant scam threatening IP rightsholders, working to protect the public by responding to hundreds of expressions of concern, publishing multiple advisory notices and working with authorities to shut down fraudulent websites.

I am grateful for the support of all IP stakeholders, without whom these advances would not have been possible, especially the hundreds of licensees who collaborate with CPATA in various ways. From contributing to the exam redevelopment, to providing feedback about the apprenticeships, to sitting on committees and working groups, your dedication supports the future of your professions. We at CPATA look forward to continuing to work together in 2025. As always, I invite anyone who wishes to get involved with the College or to speak to us about any matter to **contact us**.

A stylized, handwritten signature in black ink, appearing to read 'Juda Strawczynski'.



# About CPATA

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



## 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.*

## 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;
- setting fair entry-to-practice requirements that develop competent patent agents and trademark agents, including developing and administering fair and defensible qualifying examinations
- 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.



## Did you know?

**CPATA is the federal regulator of patent agents and trademark agents in Canada.** Most regulators are provincial, but because intellectual property is an area of federal jurisdiction, CPATA oversees patent agents and trademark agents across the country.

**CPATA is an independent regulator that acts in the public interest.** Our Board of Directors is comprised of 5 directors appointed by the Minister of Innovation, Science and Industry of Canada and 4 directors elected from the professions. CPATA acts to serve multiple publics including licensees, innovators and all Canadians.

**CPATA is entirely funded by fees from licensees.** With an Expense Budget of approximately 3 million dollars, we achieve the broad regulatory mandate set out by the Government of Canada in the *CPATA Act*.

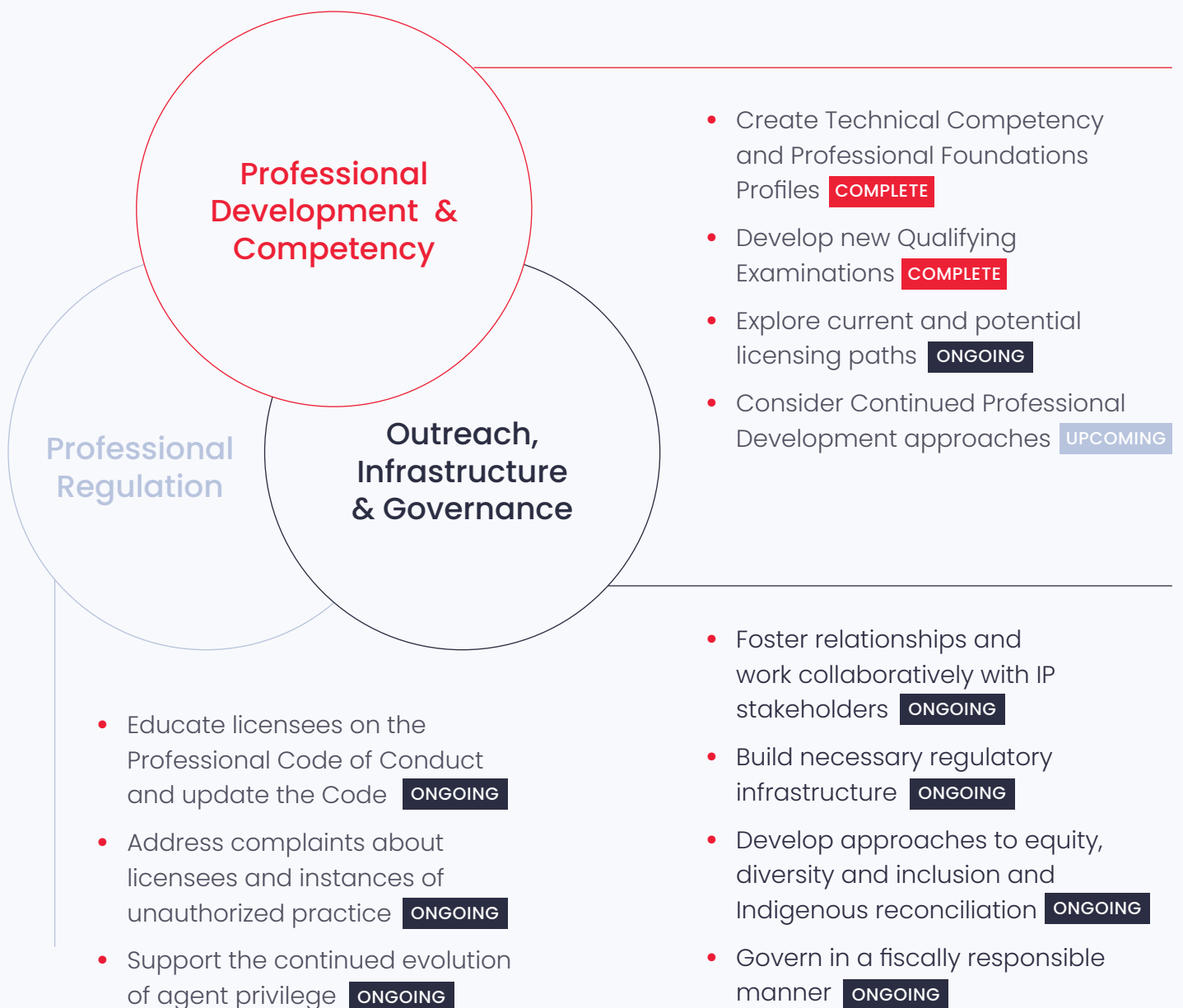
**CPATA works collaboratively with licensees to support Canada's innovation sector.** Since inception, over 100 licensees have assisted CPATA on standard setting, committees, exam administration and more.

**CPATA only has 7 employees and operates virtually.** We are small but mighty team of regulation experts. CPATA has no physical offices, and conducts meetings, hearings and qualifying exams online.

**CPATA offers all services in French and English.** We adhere to the *Official Languages Act*, valuing linguistic equity for our licensees and the public.



# 2023-2025 Strategic Framework



[Read Full Strategic Framework](#)



# CPATA's Milestones

**2021****June**

CPATA begins its operations.

**July**

All patent agents and trademark agents are subject to a Code of Professional Conduct.

Prior Experience Assessment Policy improves access to the professions for internationally-trained IP practitioners.

**2022**

CPATA addresses first cases of unauthorized practice.

**2023****March**

Board adopts the Technical Competency Profiles for Patent Agents and Trademark Agents.

**June**

Board approves CPATA's first Strategic Framework (2023-2025).

**Fall**

Discipline Committee holds its first public hearing.

**2024****January**

All licensees serving the public are required to have professional liability insurance.

**March**

The new Qualifying Examinations are launched.

**Fall**

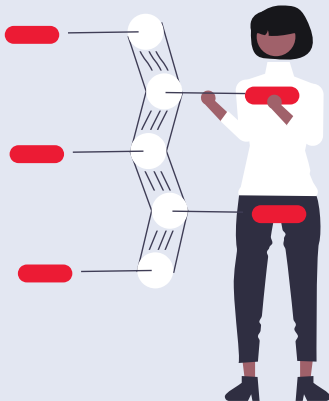
CPATA undertakes a consultation on apprenticeships.

**2025**

Initial Financial Reserves are established.

**March**

Board adopts the Professional Foundations Competency Profile.



# Portrait of the Professions

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



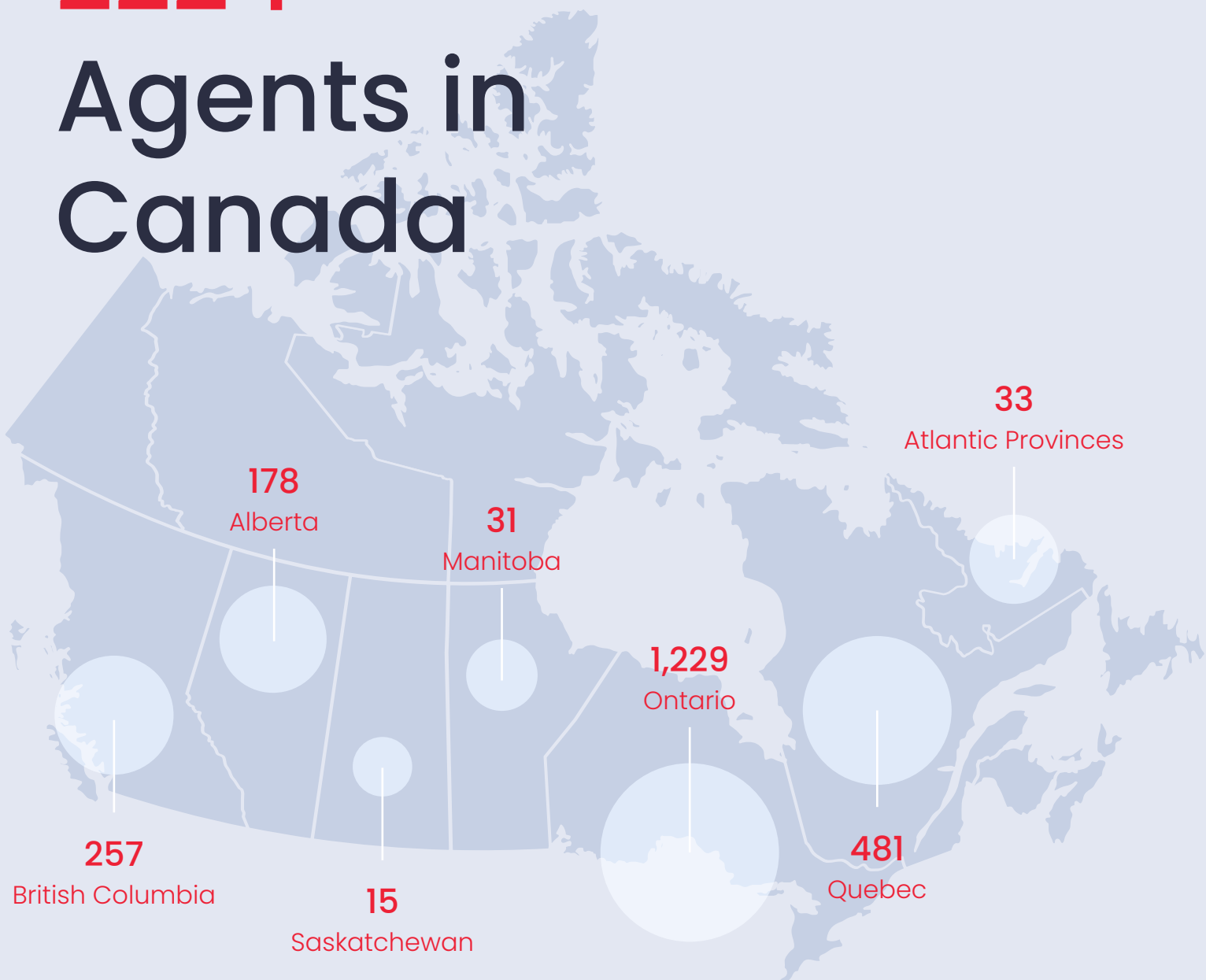
## Portrait of the Patent Agent and Trademark Agent Professions in Canada

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.

# 2224

## Agents in Canada



## CPATA's Licence Classes

**Class 1** licensees have full practice rights.

**Class 2** licensees can do everything that a Class 1 agent can do with the exception of presenting and prosecuting before CIPO.

**Class 3** licensees are agents-in-training, working under the supervision of an agent or CIPO representative.

**Class 4** licensees are "inactive" or "non-practising", whether temporarily or permanently.

### Patent Agents



**902** Class 1 Licence  
Active Agent



**13** Class 2 Licence  
Restricted Agent



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



**90** Class 4 Licence  
Inactive Agent

### Trademark Agents



**1,206** Class 1 Licence  
Active Agent



**14** Class 2 Licence  
Restricted Agent



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



**161** Class 4 Licence  
Inactive Agent

**459** of licensees hold both a patent agent and a trademark agent licence

### In 2024



**65** licences  
administratively  
suspended



**54** licences  
surrendered



**10** licences  
reinstated



## New and Improved Public Register

*This year, CPATA made it easier for members of the public to find an agent by launching an improved Public Register with increased search functionality, including the ability to find an agent by geographical location. Over time, we will build in additional features to allow for even more customized searches.*





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# Building the Professions

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*Through initiatives that define professional competency and hone entry-to-practice systems and requirements, CPATA facilitates access to qualified intellectual property expertise for Canada's innovators and creators.*



## CPATA's work on professional competency and entry-to-practice has focused on four pillars:



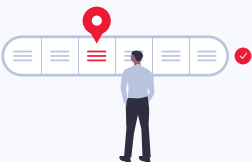
1. Addressing Barriers to Entry for Internationally-Trained IP Professionals



2. Establishing Technical and Professional Competency Profiles



3. Launching new Qualifying Examinations



4. Exploring pathways to becoming an agent

# 1. Addressing Barriers to Entry for Internationally-Trained IP Professionals

Before CPATA, internationally-trained IP professionals had to have Canadian workplace experience before being eligible to write the Qualifying Examinations. With increasing immigration to Canada, internationally-trained professionals represent an important source of potential IP service-providers in Canada. Since 2021, CPATA has taken a flexible approach to recognizing international training and education, in accordance with its Prior Experience Assessment Policy. Depending on a internationally-trained IP professionals' prior experience, the training requirement may be reduced or fully recognized, allowing them to establish eligibility for the qualifying examinations faster. This addresses barriers to entry for IP professionals coming to Canada and augments the population of competent patent agents and trademark agents for innovators and creators.





## 2. Establishing Technical and Professional Competency Profiles

A Competency Profile is a document that outlines the technical and professional knowledge and skills that agents need to provide services to their clients. Before CPATA came into force, there were no competency profiles for Canadian patent agents and trademark agents, making it more difficult for the public to understand the role of these vital professionals, and for potential practitioners to know what they must learn in order to become an agent.

With significant input from the professions, CPATA created two kinds of Competency Profiles. **The Technical Competency Profiles for Patent Agents and Trademark Agents** was adopted by the Board in March 2023. In 2024 CPATA focused on the creation of the **Professional Foundations Competency Profile**, relying on working groups of licensees and a profession-wide survey completed by 108 licensees to do so.

The establishment of clear expectations for practitioners attracts individuals into the professions, empowers the public to know what they can expect from practitioners, and helps current agents direct their continuing professional development.

### CPATA will use the Competency Profiles for example to:

- set qualifying examinations and pathways to licensure;
- guide future and current licensees in understanding the competencies required in the professions;
- support agents in their self-assessment and ongoing learning;
- guide future regulatory and educational activities;
- inform intellectual property educators about priorities for learning;
- guide employers and training supervisors to develop apprenticeship experiences for trainees;
- advance CPATA's Regulatory Objective that licensees deliver ethical and competent services.



### 3. Launching New Qualifying Examinations

Part of CPATA's mandate involves administering the qualifying examinations for becoming a patent agent or trademark agent. Since CPATA's coming into force, IP stakeholders have raised concerns about the exams. Enhancements to the legacy examinations started in 2021 with the decision to administer the exams virtually to facilitate access and reduce costs to licensees who otherwise would have had to travel. CPATA began to redevelop the qualifying examinations after the technical competency profiles were approved in 2023, with the new examinations being administered for the first time in 2024.

With the help of over 100 licensees, CPATA launched an entirely new exam regime which tests against the knowledge and skills outlined in the Technical Competency Profiles. The new exams are divided into Knowledge Exams and Skills Exams. The new framework is designed so that candidates must demonstrate foundational knowledge before testing their ability to apply their knowledge and skills. To foster candidate success, CPATA offers sample exam questions and candidate orientations. Additionally, starting in 2025, CPATA provides two opportunities to write the knowledge exams, in case candidates do not demonstrate competency the first time.

#### Patent Agent Qualifying Examinations

##### Knowledge Exam

**77** trainees took the exam

**96%** demonstrated competency

##### Skills Exams

**68** trainees took the exam

**34%** demonstrated competency

#### Trademark Agent Qualifying Examinations

##### Knowledge Exam

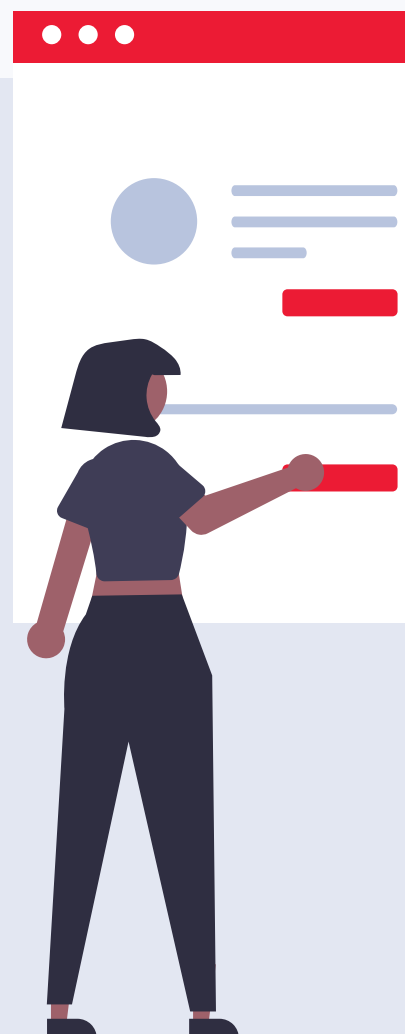
**58** trainees took the exam

**86%** demonstrated competency

##### Skills Exam

**46** trainees took the exam

**48%** demonstrated competency



## 4. Exploring Pathways to Becoming an Agent

*After establishing competency profiles and redeveloping the qualifying examinations, CPATA turned its attention to reviewing the apprenticeship model for entering the professions.*



Between June and October 2024, CPATA collected information from licensees and other IP stakeholders about their experiences with and insights about apprenticeships, which will be used to consider potential options for improving the ways to become a licensee. This consultation included focus groups with over 50 participants and a survey of trainees and supervisors that was completed by over 100 licensees. CPATA also engaged in outreach and received submissions in response to a consultation paper.

CPATA heard that some trainees struggled to find placements, and that employers had difficulty recruiting trainees and offering apprenticeships. There seem to be opportunities for improving the quality of the apprenticeship experience, or to find complementary pathways that may augment the apprenticeship experience.

CPATA's Board of Directors will be briefed on the findings and consider possible adjustments to the pathway to licensure in 2025. Any changes would be subject to further outreach with the professions and stakeholders prior to being finalized by the Board or implemented.

# Protecting the Public

*Through robust ethical education and professional responsibility programs, CPATA bolsters public confidence in the services of patent agents and trademark agents and protects Canada's innovators and creators.*



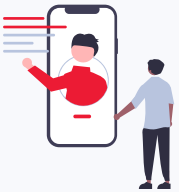


One of the key ways CPATA supports a thriving IP system in Canada is by overseeing the ethical and competent delivery of services by agents. This means striving through both proactive and reactive means to support licensees in understanding and adhering to the Code of Professional Conduct for Patent Agents and Trademark Agents. It also means acting swiftly to try and protect Canada's innovators and creators against fraud and unauthorized practice by non-qualified practitioners.

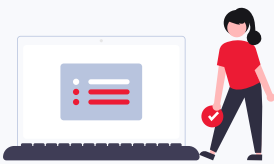
## CPATA takes a three-pronged approach to professional responsibility:



1. A robust approach to unauthorized practice and fraud



2. Proactive ethics education and support for licensees



3. A fair, open and right-touch complaints and discipline process

# 1. Taking Robust Action Against a Rampant Scam Targeting Canadian IP Rightsholders

Throughout 2024 and continuing into 2025, members of the public have been targeted in phishing attempts by fraudulent individuals and companies urging action and requesting payments to prevent 'threats' to their intellectual property.

CPATA aggressively responded to protect those targeted. The College:

- received and responded to over **225 expressions of concern**
- published **multiple notices** advising public caution
  - January 15, 2025: [Scams Targeting IP Rights Holders Continue in 2025](#)
  - November 4, 2024: [Trademark Scam Circulating – CPATA Advises Public Caution](#)
  - August 1, 2024: [Scam Alert – Fraudulent Notices Related to Patents and Trademarks](#)
- worked with authorities to shut down fraudulent websites
- launched a **new fraud webpage** centralizing notices, tips to spot fraud, and contact information to alert CPATA
- Collaborated with CIPO, IPIC and others

In addition to this circulating scam, staff investigated and addressed eight other concerns related to unauthorized practice.

“ Thank you so much for your quick reply. I feel a great sense of relief after reading your message. ”

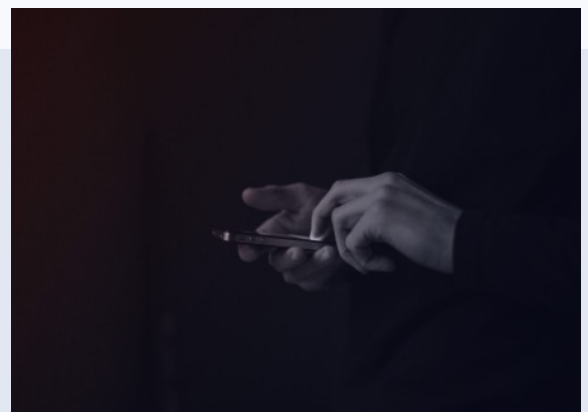
Canadian Association of Mutual Insurance Companies

“ I thank you for CPATA’s diligence and wish you the best of luck tracking this fraudster down. ”

Greymouse Web Design & Local Marketing Services

“ Thanks for all this information, and for the work your organization is doing to combat this! ”

Stride Consulting



## Trademark Scam Circulating – CPATA Advises Public Caution

Members of the public are being targeted in phishing attempts by fraudulent individuals and companies.....

January 14, 2025

## 2. Upstream Prevention: Working with Licensees to Prevent Harm and Reduce Risks to the Public

Instead of depending exclusively on a complaints and discipline process to address harms after the fact, CPATA proactively provides guidance and resources to licensees, thereby facilitating the provision of high-quality services to innovators and creators. CPATA also provides ethical guidance on a case-by-case basis to agents who reach out with questions. In 2024, CPATA launched a searchable database of articles, which licensees can filter by Rule of the Code of Conduct or by topic, and will continue to add new resources to this database.

Filter :

### File Transfer

Competence
Withdrawal of Services

Fundamental Canon

**Topics:** Withdrawal/Transfer/Change of Status, Communications

Situation: You are an agent leaving your firm to pursue an opportunity with another employer. ... [Read More](#)

### Fees, Disbursement, foreign agents

Fees

**Topics:** Withdrawal/Transfer/Change of Status, Communications

The Code of Professional Conduct provides ethical rules for the conduct of licensees, which range ... [Read More](#)

### Withdrawal of services on surrender of license

Withdrawal of Services

**Topics:** Withdrawal/Transfer/Change of Status, Communications

The following analysis applies where a licensee is surrendering their licence because they are unable ... [Read More](#)

### Leaving current practice for another job

Withdrawal of Services

**Topics:** Withdrawal/Transfer/Change of Status, Communications

The following analysis applies when a licensee has been retained by a client whose file ... [Read More](#)

### Example Inquiries

Does CPATA have any guidance for agents regarding the safe and effective use of Generative AI in practice?

Is it permissible for an in-house counsel agent to also provide agency services to clients through their own consultancy business on the side?

Are there any unique ethical considerations when representing a minor in a patent application?

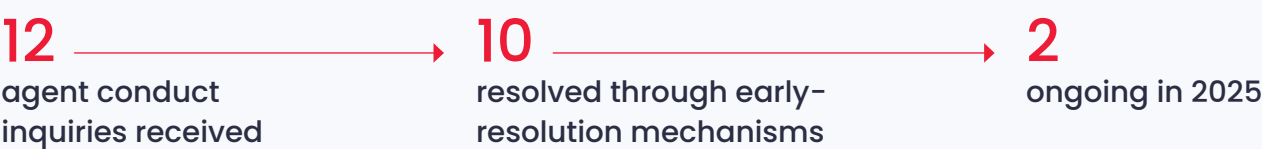
**28**  
ethical  
inquiries  
addressed

# 3. Inquiries, Complaints, Investigations and Discipline in 2024

CPATA’s professional responsibility process capitalizes on right-touch, risk-focused early resolution approaches where appropriate, and also addresses concerns and complaints regarding licensees in a fair, principled and transparent manner.

## Agent Conduct Inquiries

Before or instead of filing a complaint, individuals can file an **agent conduct inquiry**, an informal resolution process which is often a quicker and more efficient way to resolve concerns about an agent.



## Complaints, Investigations and Discipline

Complaints about licensees undergo a fair process which include an initial review by the Registrar, and may involve a thorough investigation by the Investigation Committee, a public, virtual hearing in front of a Discipline Panel, and ultimately a Decision of the Discipline Committee.

## 6 new complaints

Complaint Types

Resolutions

4   complaints from clients	2   dismissed by the Registrar (1 appealed, dismissal upheld)
	2   referred to Investigations Committee (still open)
2   new complaints initiated by the Investigations Committee	2   remain open in 2025



# 2024, a Year of Firsts



**1.** The Registrar dismissed his first complaints.



**2.** The Investigations Committee considered its first appeal of a complaint dismissal by the Registrar.



**3.** The Investigations Committee administered its first interim suspensions of two licensees in the interests of public protection.



**4.** The Discipline Committee released its first written decisions.



**5.** The Federal Court upheld the Investigation Committee's Dismissal of a Complaint in CPATA's first judicial review.

# Strengthening relationships

*As a young regulator, CPATA is actively integrating into and providing support to the IP sector in alignment with its distinct mandate and duties.*



*To fulfill its regulatory mandate, CPATA works hand-in-hand with the federal government, provincial IP organizations, intellectual property associations, educational institutions, and other regulators. In 2024, CPATA demonstrated leadership and collaboration within the IP and professional regulation sectors.*

## Intellectual Property Institute of Canada (IPIC)'s Annual Conference



*CPATA Board and staff members were present at the conference in St. John's and CPATA held a Q&A session and two roundtable lunchtime sessions.*

## Law Society of Ontario's 29th Intellectual Property Law: The Year in Review



*CPATA's CEO and Registrar Juda Strawczynski spoke on a panel addressing the topic of generative artificial intelligence.*

## Annual General Meeting and Licensee Outreach

CPATA hosted its Annual General Meeting on June 13, 2024 and continued outreach initiatives to get in touch with licensees from all practice backgrounds and locations, hosting two virtual meetings with CPATA's CEO and Board Directors and in-person visits to firms. These meetings give licensees an opportunity to connect with CPATA to ask questions and share their perspectives.



## Annual Conference of the Canadian Network of Agencies for Regulation



CPATA staff participated in CNAR's conference to both gain and share important learnings, including a CNAR TV session between CPATA CEO Juda Strawczynski and Alan Clamp of the Professional Standards Authority.



## Intellectual Property Ontario's IP Summit

Chair of CPATA's Board of Directors Ruth McHugh and CPATA CEO and Registrar Juda Strawczynski participated in the exceptional platform for collaboration and knowledge-sharing provided by IPON, chaired by Karima Bawa (who is also a CPATA Director).



# Financial Sustainability

*By managing finances effectively, CPATA is setting itself up to fulfill its regulatory mandate long-term at no cost to the Canadian Government or Canadian taxpayers.*



## Financial Update

CPATA came into force in 2021 with no government funding. Its mandate is broad and includes protecting the public in addition to regulating professionals. CPATA continues to work towards financial independence and continues to operate at no cost to the Canadian government or taxpayers. 2024 was the first year that CPATA's licensing fees reflected the full cost of regulation, including the need to build regulatory reserves for operations and complex professional regulatory initiatives. CPATA operated below its 2024 budget to develop regulatory reserves as early as possible, with the goal of full financial sustainability. As CPATA moves towards meeting its reserve targets, the College will continue to evaluate the licensing fees necessary to sustain regulation for the long-run.

## Financial Reports

The financial information presented below is an extract from CPATA's 2024 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 2024 are available at [www.cpata-cabamc.ca/financial-reports](http://www.cpata-cabamc.ca/financial-reports).

### CPATA's Financial Position

	December 31, 2024	December 31, 2023
Assets	\$ 1,900,295	\$ 490,942
Liabilities	\$ 175,011	\$ 198,644
Net assets	\$ 1,725,284	\$ 292,298
Liabilities and net assets	\$ 1,900,295	\$ 490,942

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

	2024	2023
Revenues	\$ 3,904,104	\$ 2,206,525
Expenditures	\$ 2,471,118	\$ 2,219,110
Excess (deficit) of revenues over expenditures	\$ 1,432,986	\$ (12,585)
Net assets, beginning of the year	\$ 292,298	\$ 304,883
Net assets, end of the year	\$ 1,725,284	\$ 292,298



## Revenue Notes

*CPATA is working towards building financial sustainability so that as operations scale up to address all areas of regulatory responsibility, CPATA is properly resourced to perform its statutory duties. This includes building financial reserves that professional regulatory colleges develop to cover extraordinary expenses such as major investigations or litigation, or unforeseen circumstances.*

- In order to do this, licence fees were increased for 2024 which led to a significant increase in fee revenue from \$1,996,597 in 2023 to \$3,583,148 in 2024. Fee revenue was 11% higher than budget for 2024.
- 2024 was the first year of the new Qualifying Examinations, including the Knowledge Exams and Skills Exams.
- The additional fee income enabled CPATA to increase investment in Guaranteed Investment Certificates (GIC's) and resulted in additional interest income. As CPATA builds financial reserves, the ability to invest funds will increase and should provide income for the future.
- The number of applications and resulting fee income increased slightly over the previous year due to an increase in the number of agents in the professions.
- Decisions of the Discipline Committee have led to the recovery of a portion of the costs from hearing processes.

## Expenditure Notes

*Even with the increase in revenue, CPATA maintained tight control over expenses. Although expenses increased 10% from 2023 with the continued development of programs, we ended the year 18% under budget for expenses (\$525,000).*

- Board of Directors remuneration and meeting-related expenses decreased from the previous year. Travel for meetings and the number of meetings was reduced where possible in 2024.
- Legal fees decreased in 2024 as numerous projects concluded in 2023. Legal fees in 2024 related mostly to discipline matters.
- An increase in the number and complexity of discipline-related matters caused an increase in Discipline Committee and Discipline Panel remuneration in 2024.
- With the new Knowledge Exams in 2024, exam software costs increased.
- Consulting fees related to the development of the new Qualifying Examinations and the Competency Profiles increased.
- Salaries and benefit costs increased in 2024 as staff received increases, and new staff from 2023 were on board for a full year. Financial services support was brought in-house with the hiring of a part-time CFO. This resulted in decreased finance and accounting costs.





# Governance

*CPATA's governance structure, comprising a highly skilled Board and dedicated Committees, sets the standard for excellence. With a focus on transparency, accountability, and strategic vision, CPATA's leadership ensures optimal decision-making and organizational success.*



## 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 Canadian Alliance of Physiotherapy Regulators; Independent Advisor to the Board, Audit Committee, Internet Corporation for Assigned Names and Numbers (ICANN) and Public Technical Identifiers (PTI)
- 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; Independent Auditor (IIA-CGAP) and Chair - Canadian Space Agency Audit Committee.
- Corporate Director (ICD.D/IAS.A), Desjardins Bank Vice-President (Caisse Lac Memphremagog), President Governance and Ethics, Audit and Risk and the CEO Performance Review and Compensation committees.
- Jurist (LL.M) and Corporate Director, Board of Directors Public Relations without Borders, Member of the Governance and Financial Audit committees.
- Member, Saint-Justine University Hospital Corporation.

**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



### **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



### **Steve Garland** | Patent Agent Director *Ontario*

- Patent agent, Trademark agent and retired lawyer (Ontario, B.C. and Alta) and retired P. Eng (Ontario).
- Fellow and Past President of the Intellectual Property Institute of Canada and Past President of the International Association for the Protection of Intellectual Property (AIPPI) Canada.
- Member of Smart & Biggar IP Law for 35 years and prior Managing Partner.



### **Scott Jolliffe** | Trademark Agent Director *Ontario*

- Former intellectual property litigation lawyer and trademark agent
- Worked in the IP field at Gowlings for 50 years before retiring in 2024
- Served as the managing partner and CEO of Gowlings for over 20 years

## 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.

**Thomas Conway** – *Chair*

**Karima Bawa**

**Amber Batool**

**Brigitte Chan**

**Peter Cowan**

#### 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*

**Andrew Currier**

**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.

**Mark Pioro** – *Chair*

**Alessandro Colonnier**

**Tina McKay**

**Heidi Jensen**

**Jeffrey Orser**

**Hilary Rose**

**Natalie de Paulsen**

### 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*

**Jean-Sebastien Briere**

**Pierre Cantin**

**Sanjay Goorachurn**

**Kiril (Liam) Grigoriev**

**Teresa (Terry) Jaenen**

**Barb Murchie**

**Karol Pawlina**

**Len Polsky**

### 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**

**Charles Boulakia**

**Jay Sengupta**

**Benoit Yelle**

**Jean Whittow**

**Sam Lanctin**

**Guy Joubert**

**Susan Boulter**

**Kathleen Lickers**

**Herman Van Ommen**

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# Looking Forward to 2025

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*In addition to its core regulatory work, CPATA will work on improving access to the professions, creating resources to support licensees and engaging in strategic planning.*



## Looking forward to 2025

**Pathways to Licensure:** With the goal of constantly improving access to the professions and the availability of IP expertise in Canada, CPATA's review of the current pathways to licensure will continue and the Board will consider and consult with stakeholders on possible changes.

**Resources to Support Licensees:** Besides the ethics articles published regularly, CPATA will develop a few videos to help licensees understand key areas of the Code of Professional Conduct, to proactively reduce risks to the public.

**Strategic Planning and Financial Sustainability:** 2025 is the final year of CPATA's first Strategic Framework. Starting this spring, the Board will assess the ongoing progress of this framework and consider the elements of the next Strategic Framework for 2026 and beyond. This methodic planning process will help CPATA forecast the financial resources required to meet our current and longer-term objectives.

We look forward to collaborating with our licensees and stakeholders on these significant and exciting projects in 2025.





 **cpata**  
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COLLEGE OF PATENT  
AGENTS & TRADEMARK AGENTS

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

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