



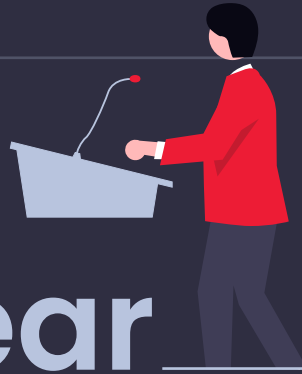
Annual Report

2025

Table of Contents

3	Snapshots from the Year
4	Message from the Chair of the Board
5	Message from the CEO and Registrar
6	What CPATA Delivers
7	Closing the 2023–2025 Strategic Framework
8	Portrait of the Professions
13	Building the Professions
18	Protecting the Public
25	Financial Sustainability
30	Governance
36	Looking Forward

Snapshots from the Year



Throughout 2025, CPATA was actively engaged in Canada’s innovation and regulatory communities, working alongside those who advance intellectual property and public protection. We are grateful for the collaboration and dedication of our partners, and proud to work together in support of innovation and public trust.



Intellectual Property Institute of Canada Annual Conference



Innovation Asset Collective’s National IP Summit



Canadian Network of Agencies for Regulation’s Annual Conference



College of Immigration and Citizenship Consultants’ Annual Conference



CPATA’s Annual General Meeting





Message from the Chair of the Board

Ruth McHugh | Chair

2025 was an important year for CPATA. It marked the final year of the College's 2023–2025 Strategic Framework, which focused on solidifying CPATA's regulatory foundations and positioning the organization for long-term success as an independent public-interest regulator.

From the Board's perspective, this period has been about ensuring CPATA is set up for long-term regulatory excellence. CPATA operates with a broad mandate that includes responsibilities not always carried out by IP regulators in other jurisdictions, such as administering qualifying examinations and addressing unauthorized practice. CPATA continues to deliver on this mandate effectively and responsibly.

As an organization funded entirely through fees, CPATA must be accountable and disciplined in how it uses its resources. During 2025, the Board continued its oversight of financial planning and risk management to support CPATA's stability and independence over the long term.

I have served on CPATA's Board since 2019, including the period before the College came into force, and became Chair in 2023. Over that time, I have seen CPATA evolve from a new organization into a confident and capable regulator. This progress reflects the dedication of CPATA's leadership, staff, and Board, and the professionalism of the regulated community.

As CPATA looks ahead, the Board remains focused on strong governance, sound data-driven evidence-based decision-making, and the continued evolution of the College in support of a trusted and effective regulatory framework. We all look forward to continuing this important work.

A handwritten signature in black ink, consisting of the letters 'R' and 'Mc' in a stylized, cursive font.



Message from the CEO and Registrar

Juda Strawczynski | CEO and Registrar

CPATA supports access to highly skilled patent agent and trademark agent professionals who safeguard Canada's intellectual capital—one of the country's most important assets, especially in times of global and economic uncertainty. As 2025 comes to a close, it gives an opportunity to reflect on a year of meaningful progress for CPATA and on what we have accomplished over the course of our 2023–2025 Strategic Framework. During this time we focused on building the strong foundations to regulate patent agents and trademark agents to benefit all Canadians.

CPATA is a small regulator with a broad mandate. Regulation may operate behind the scenes, but its role is vital: it ensures public trust, fosters access to expertise, and enables innovators to protect and leverage their intellectual property with confidence. We have worked to establish a strong, sustainable, and independent regulatory foundation that instills public confidence in patent agents and trademark agents.

2025 brought many concrete accomplishments. We improved consumer access to agents through an updated Public Register, completed a full competency framework for patent agents and trademark agents with the help of licensees and subject matter experts, and protected the public from a rampant IP fraud by publicly naming and shaming bad actors, educating the public on how to spot the fraud, and working with government, regulators, and law enforcement to protect Canadians. We continue to strive for regulatory excellence that strengthens public confidence and expands access to patent agent and trademark agent services across Canada.

Looking ahead, I am excited for CPATA's next Strategic Framework, covering 2026–2028. Our focus remains unwavering: to provide Canadians with access to a globally respected body of patent agents and trademark agents who are highly skilled, ethical, and current in their knowledge. We look forward to working together to achieve these goals and continue building a strong, trusted, and innovative IP system for Canada.

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

What CPATA Delivers

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



Trusted access to qualified agents

CPATA helps Canadians confidently find licensed patent agents and trademark agents through a searchable Public Register of all licensees and foreign practitioners.

Rigorous standards of professional competence

CPATA develops standards of professional competency giving a clear understanding of the expert and ethical services the public can expect to receive from agents.

Transparent and fair pathways into the professions

CPATA establishes clear and equitable entry-to-practice requirements, including supervised practice training and qualifying examinations that promote readiness for real-world practice.

Public protection from harm

CPATA actively addresses concerns of licensee misconduct according to the Code of Professional Conduct, as well as unauthorized practice by non-licensees and fraud. These actions help safeguard the public, uphold confidence in the professions and the College, and protect the integrity of Canada's IP system.

Celebrating Milestones: Closing CPATA's 2023–2025 Strategic Framework

2025 marks the end of CPATA's **2023–2025 Strategic Framework**, which focused on strengthening our regulatory foundations. We take pride in the significant progress achieved including these highlights:



Find an Agent

- Made it easier to find an agent by enhancing the search functionality of the Public Register.



Regulatory Sustainability

- Strengthened operational infrastructure and financial independence to support effective, independent regulation over the long term.



Entry to Practice

- Redeveloped the Qualifying Examinations to improve fairness, defensibility and alignment with competency requirements, and increased exam frequency.
- Introduced measures to help trainees identify and connect with supervisors.



Professional Competency

- Adopted technical and professional foundations competency profiles for patent agents and trademark agents, establishing a consistent framework outlining required skills and knowledge across both professions.



Public Protection

- Delivered proactive Code of Conduct education to licensees on ethical obligations through videos, articles, and direct responses to ethics inquiries.
- Addressed inquiries and complaints concerning licensees in a proactive, principled and proportionate manner.
- Took robust action against unauthorized practice and fraudulent activity.

Portrait of the Professions

CPATA is committed to facilitating public access to expert IP services from highly competent and ethical patent agent and trademark agent professionals.



New Data on the Patent Agent and Trademark Agent Professions

CPATA enhanced the Annual Licensee Report and launched an optional Demographic Survey to create a clearer, data-driven picture of the patent agent and trademark agent professions. Following a public consultation in fall 2024, new questions captured practice settings, client types, areas of practice, work activities, and continuing professional development. Licensees completed the updated report for the first time during the 2025 renewal process.

A more complete understanding of the professions through aggregated insights helps inform policy decisions, supports evidence-based improvements to the regulatory framework, and contributes to more accessible IP professions.



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.

Number of Patent Agents by Licence Class



894 **Class 1 Licence**
Full practice rights

23 **New Class 1**
licences issued



13 **Class 2 Licence**
Restricted practice rights before CIPO



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

57 **New Class 3**
licences issued



101 **Class 4 Licence**
Inactive or non-practicing

Number of Trademark Agents by Licence Class



1166 **Class 1 Licence**
Full practice rights

22 **New Class 1**
licences issued



13 **Class 2 Licence**
Restricted practice rights before CIPO



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

47 **New Class 3**
licences issued



183 **Class 4 Licence**
Inactive or non-practicing

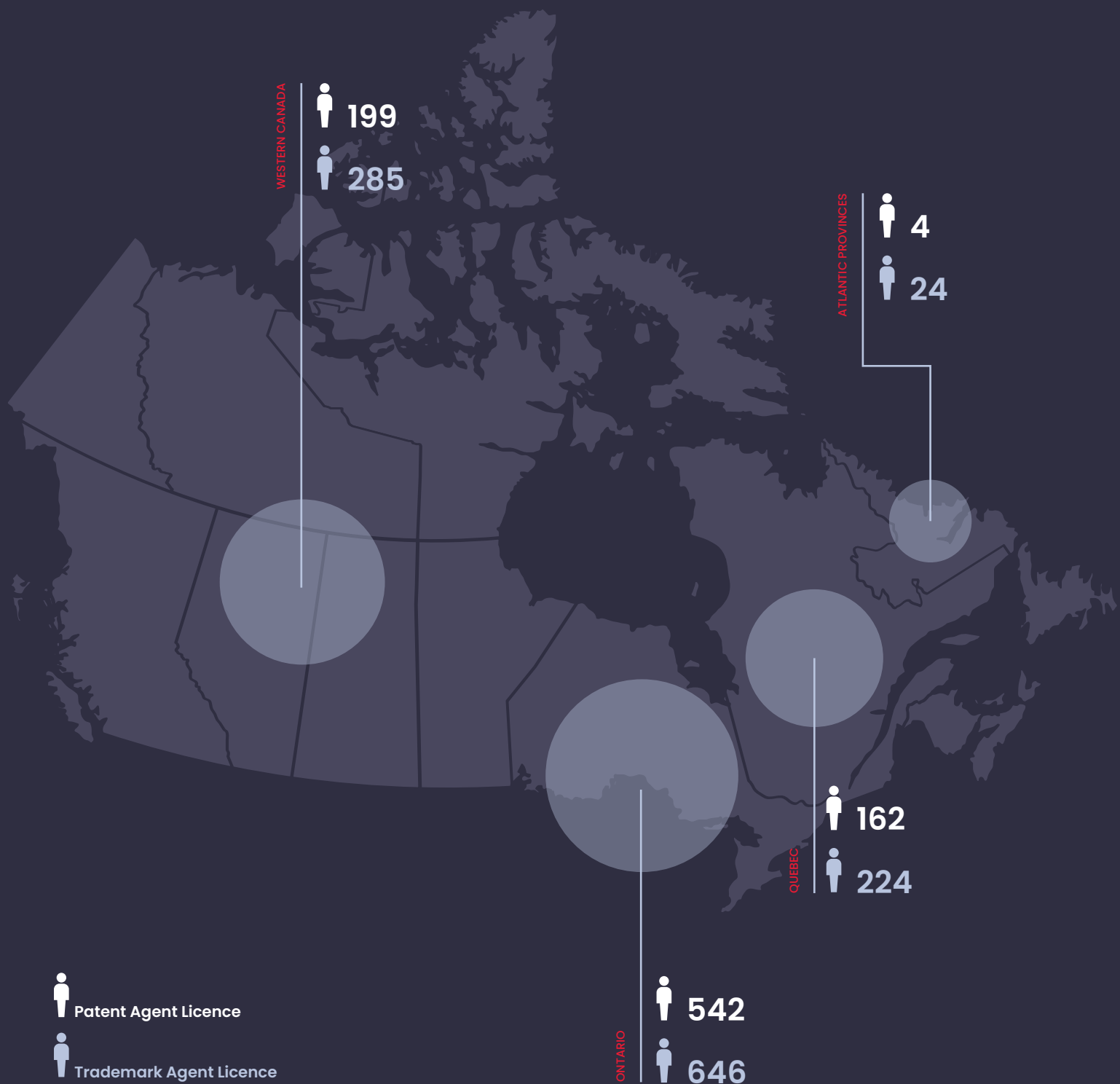


457
Agents hold both a patent agent and trademark agent licence.

2086 Class 1 and 2 Licences in Canada

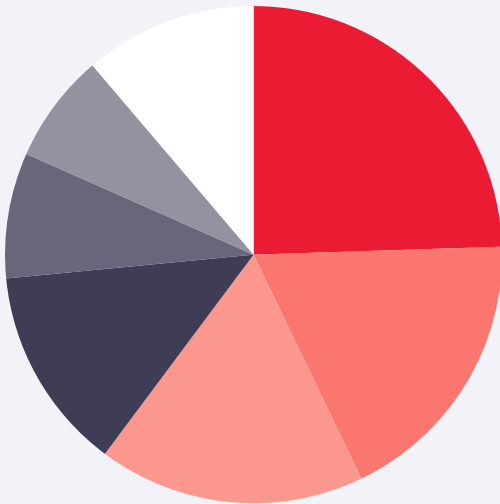
907 Class 1 and 2 Patent Agent Licences

1179 Class 1 and 2 Trademark Agent Licences



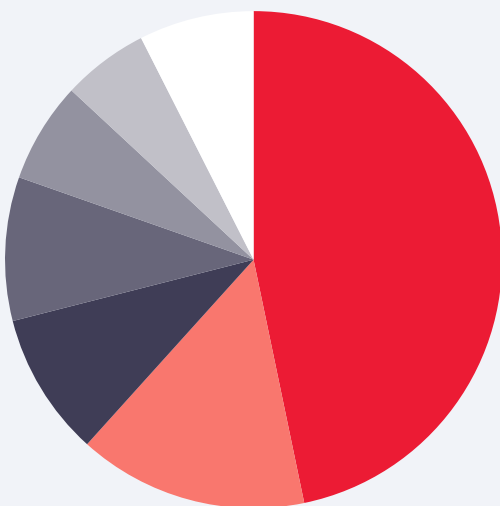
Patent Agent Licences

Client Size Distribution Among Patent Agent Licence Holders



- 24%**
Small & Medium Sized Enterprise (Privately held)
- 18%**
Publicly traded company
- 17%**
Large Enterprise (Privately held)
- 13%**
Start-up (a company in the first stages of operations)
- 8%**
Research organizations, government or academic institutions
- 7%**
Individual innovator
- 0%**
Investors (VCs/PEs)
- 11%**
Unknown

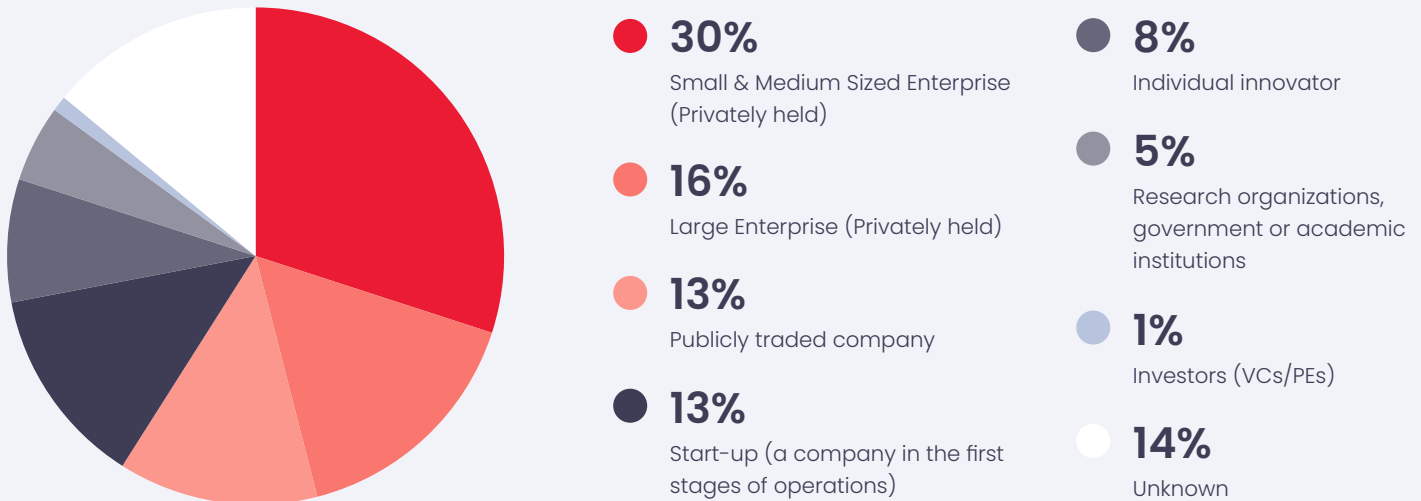
Percentage of Time Spent on Various Work Activities by Those Who Hold a Patent Agent Licence



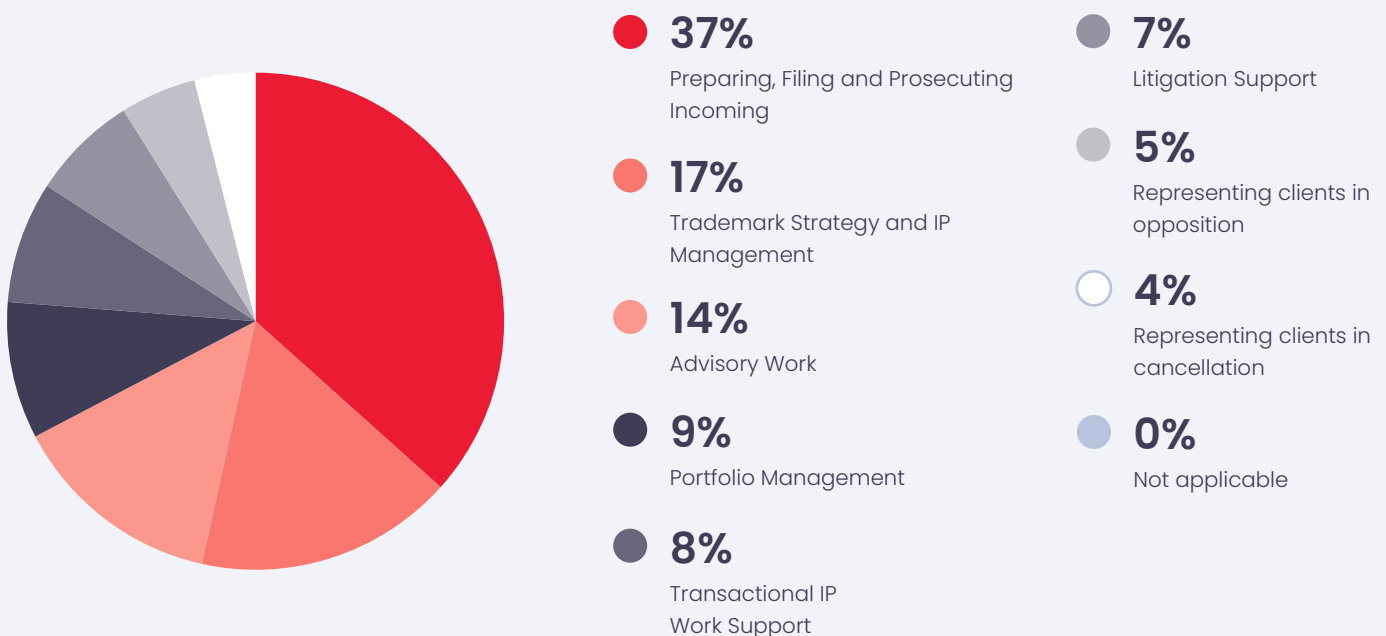
- 50%**
Drafting, Filing and Prosecuting
- 16%**
Patent Strategy and IP
- 10%**
Portfolio Management
- 10%**
Advisory Work
- 7%**
Litigation or Litigation Support
- 6%**
Transactional IP Support
- 8%**
Not applicable

Trademark Agent Licences

Client Size Distribution Among Trademark Agent Licence Holders

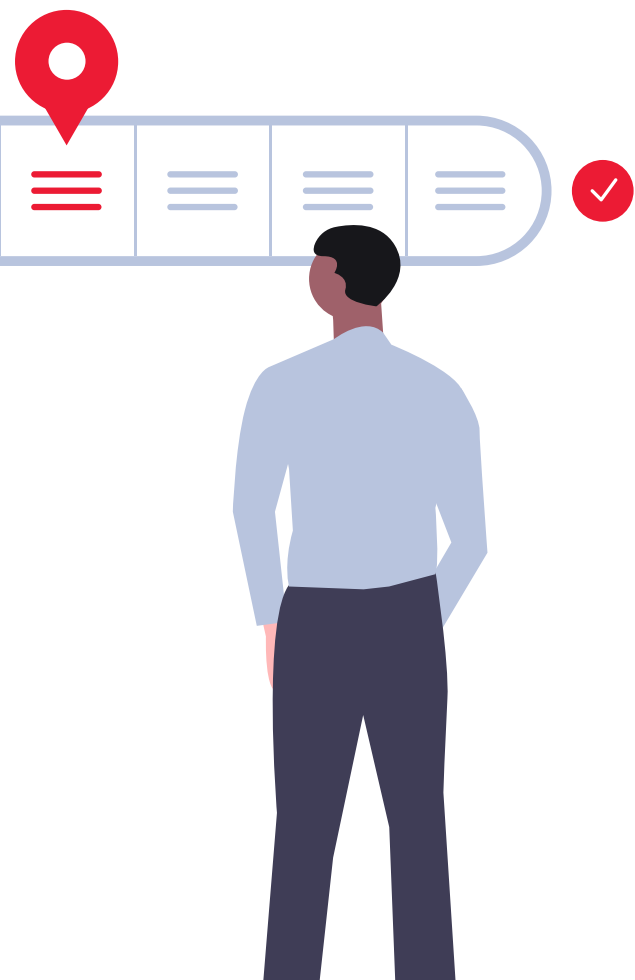
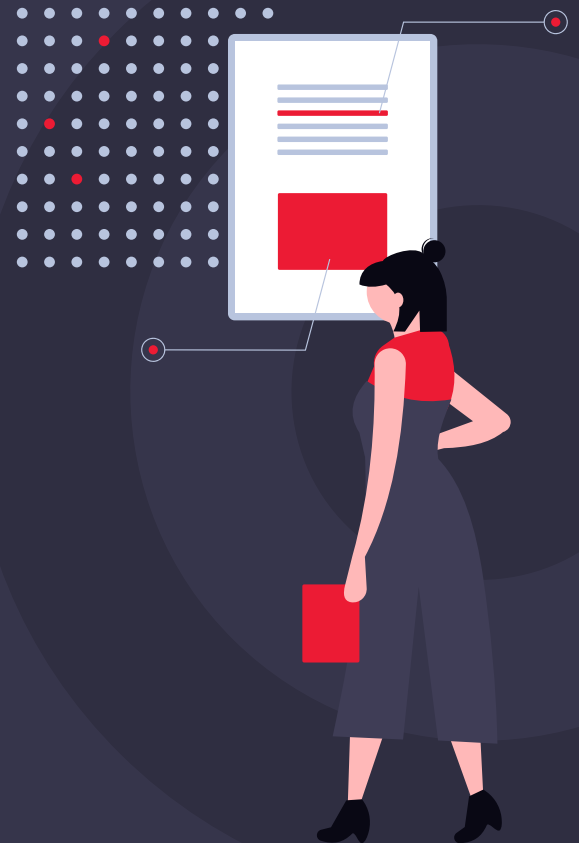


Percentage of Time Spent on Various Work Activities by Those Who Hold a Trademark Agent Licence



Building the Professions

From the outset, CPATA has worked to clearly articulate what it means to be a competent patent agent or trademark agent, refining entry-to-practice requirements to support fair, accessible pathways into the professions.



How to Become a Patent Agent or Trademark Agent

Currently, patent agent and trademark agent trainees must complete a 24-month supervised practice training program and then pass qualifying examinations. Though these requirements in Canada produced many excellent agents, CPATA has heard from licensees and other IP partners that there is room for improvement and is continuously working to refine the entryway to practice.

1

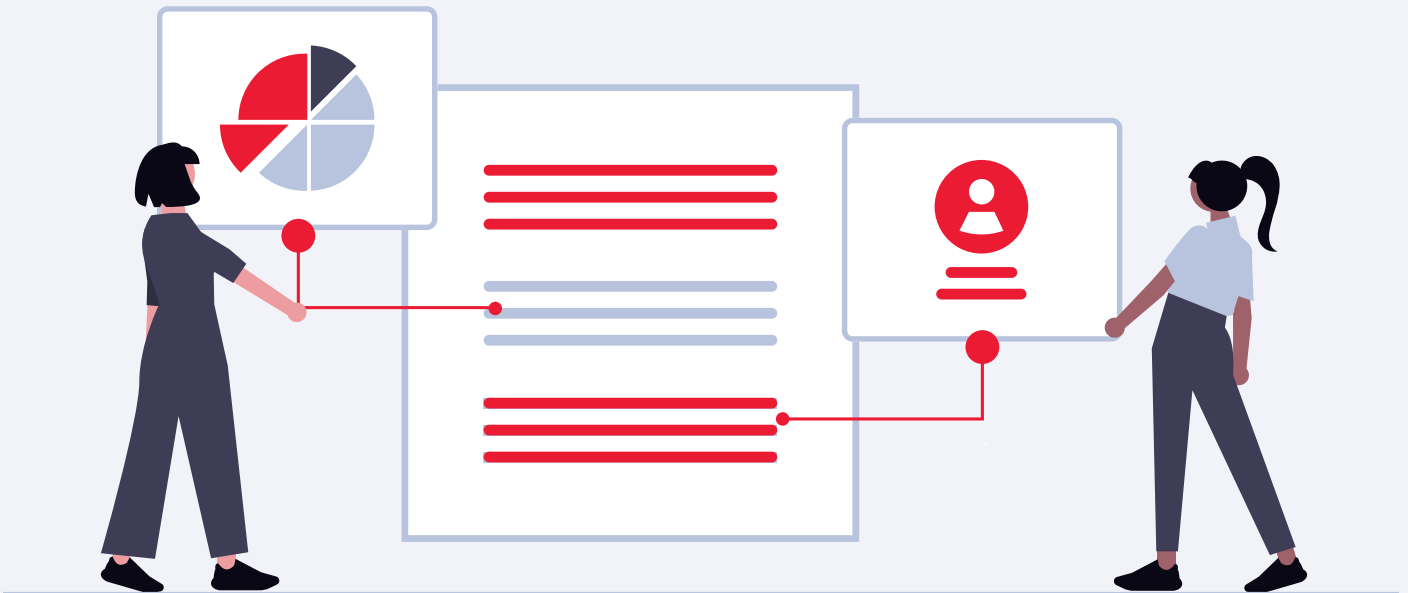
Complete 24 months of supervised practice

2

Pass the Qualifying Examinations

Improvements to Professional Competency and Entry-to-Practice

In 2025, CPATA continued ongoing work and acted swiftly on the key findings of the 2024 consultation on supervised practice to make policy and practical changes with the goal of improving the licensure process, without compromising standards.



Defining Professional Competency



Professional Foundations Competency Profile adopted

A complete competency framework is essential to establishing clear expectations for practitioners, attracting individuals into the professions, and empowering the public to know what they can expect from practitioners.

After the adoption of the [Technical Competency Profiles for Patent Agents and Trademark Agents](#) (outlining technical knowledge and skills) in 2023, the [Professional Foundations Competency Profile](#) (outlining professional skills) was adopted by the Board in 2025.

Supporting the Supervised Practice Training Program

The top two findings of the consultation on supervised practice were: the greatest barrier to licensure is an inability to secure a supervised practice placement; and the lack of structured training requirements poses difficulties for both trainees and supervisors. CPATA immediately took steps to address this feedback.



Trainees and supervisors can now connect via the Public Register

A new Public Register feature helps connect supervisors and trainees looking for a placement. Agents who are open to supervising a trainee and current trainees who are looking for a supervisor can indicate so on their profile. This information is now searchable on the Public Register.



Supervisors and trainees were surveyed to create resources for supervised practice

Trainees and supervisors were invited to complete a survey to help CPATA understand how trainees are exposed to competencies as well as supervision and workplace strengths. Survey data will be used to inform the development of three assessment resources, which will be available in the future:

- 1. Training Plan:** a tool for supervisors and trainees to use for structuring their training experience
- 2. Interim Assessment:** a tool for supervisors to assess the progress of trainees
- 3. Summative Evaluation:** a tool for supervisors to assess trainees at the end of their training



CPATA is continuing to explore alternative pathways to licensure

CPATA continues to consider potential additional or alternative pathways to licensure. No policy decisions have been made and should such major changes be proposed, CPATA will consult on those changes.



Qualifying Examinations

Since before CPATA's coming into force, IP stakeholders raised concerns about the qualifying examinations. CPATA launched an entirely new exam regime in 2024 which tests against the knowledge and skills outlined in the Technical Competency Profiles. The new exams are divided into Knowledge Exams and Skills Exams; candidates must demonstrate foundational knowledge before testing their applied abilities. CPATA made incremental improvements to the new exams, and adjusted policies to reduce unnecessary delays in entry-to-practice.



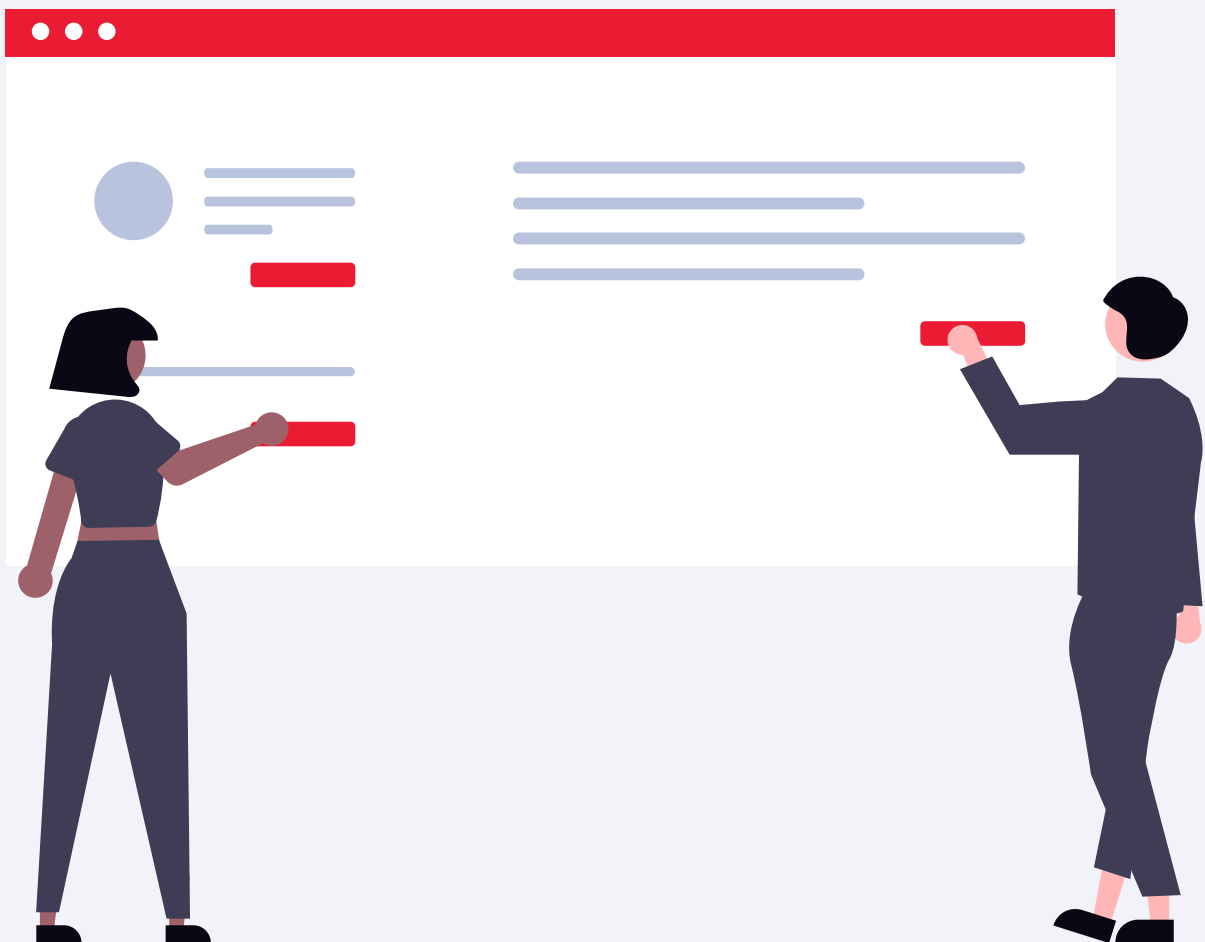
Knowledge Exam eligibility criteria was reduced

CPATA changed eligibility criteria for the Knowledge Examinations to reduce unnecessary delays in entry to practice. Starting in 2026, class 3 agents in training who have completed at least 12 months of approved supervised training by the examination date are eligible to attempt the Knowledge Examination.



The Knowledge Exams are now offered twice a year instead of once

Starting in 2025, the Knowledge Examinations for Patent Agents and for Trademark Agents are offered twice per year, in winter and in spring. This allows agents in training who do not demonstrate competency on the first administration a second chance before the annual Skills Exams in the fall.



2025 Patent Agent Qualifying Examinations

Knowledge Exam

WINTER ADMINISTRATION

36 trainees took the exam

80% demonstrated competency

SPRING ADMINISTRATION

23 trainees took the exam

96% demonstrated competency

Skills Exams

PART 1

67 trainees took the exam

39% demonstrated competency

PART 2

79 trainees took the exam

42% demonstrated competency

2025 Trademark Agent Qualifying Examinations

Knowledge Exam

WINTER ADMINISTRATION

34 trainees took the exam

85% demonstrated competency

SPRING ADMINISTRATION

29 trainees took the exam

90% demonstrated competency

Skills Exams

64 trainees took the exam

30% demonstrated competency



Protecting the Public

CPATA takes a three-pronged approach to professional responsibility.



1

Proactive ethics education and support for licensees



2

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



3

A robust approach to unauthorized practice and fraud

1

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.



Article Offering Generative Artificial Intelligence (GenAI) Guidance to Agents

Given the rapid emergence of GenAI, CPATA provided licensees with ethical guidance, risk considerations and resources to consider when using these new technologies.



Videos on the Code of Professional Conduct

CPATA developed three videos on the Code of Professional Conduct in English and in French.

Presented by experienced agents and covering topics like integrity, conflicts of interest and communications, these videos provide patent agents and trademark agents and trainees with a deeper understanding of the Code and helpful practice tips for their everyday work.

- **Video 1:** Introduction to the Code of Conduct and the Fundamental Canon of Integrity
- **Video 2:** Competent and Ethical Communications (Part 1)
- **Video 3:** Competent and Ethical Communications (Part 2)

Ethics in Action

Video Resources

Presented by experienced agents and including helpful guidance for ethical practice.



Brigitte Chan
Trademark Agent



Gabrielle Moisan
Patent Agent



Joanne Nardi
Trademark Agent



Marie-Hélène Rochon
Patent Agent



Andrew Currier
Patent Agent and
Trademark Agent



Awa Carole Diop
Patent Agent



Ethics inquiries

CPATA also provides ethical guidance on a case-by-case basis to agents who reach out with questions.

21 ethics inquiries addressed

If I take incoming work from a foreign client via instructions from a foreign agent, is the foreign client or the foreign agent considered my client?

Is it a conflict of interest for me if a registered mark in the trademark application of one client is cited against the trademark application of another client?

How should I handle unpaid invoices?

How can I as a sole practitioner prepare a "client contingency plan" in case I have to stop practicing unexpectedly, for example due to illness?

What are my ethical obligations and responsibilities if a client may have diminished capacity to make decisions due to a mental disability?



2

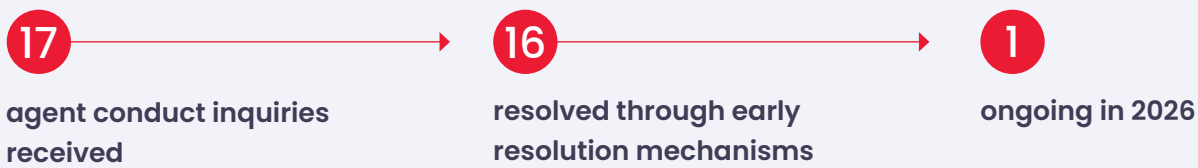
Inquiries, Complaints, Investigations and Discipline in 2025

CPATA’s professional responsibility process capitalizes on right-touch, risk-focused early resolution approaches where appropriate, and 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.



94%

of agent conduct inquiries were resolved through early resolution mechanisms without requiring formal investigation.

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.

15 complaints addressed in 2025

Complaint Types

5 | complaints carried forward from 2024

10 | new complaints

Resolutions

2 | dismissed

2 | remain open

1 | in review by the Discipline Committee

8 | resolved via early resolution mechanisms

2 | remain under investigation

Discipline

1 matter closed in 2025 by the Discipline Committee that was opened in 2023.

No new matters referred to hearing in 2025.



70%

of complaints were resolved or closed without a referral to the Investigations Committee.

3

Taking Robust Action Against a Rampant Scam Targeting Canadian IP Rightsholders

Since 2024, international scammers have been preying on Canadian IP rightsholders, sending out phishing e-mails and (more recently) fraudulent text messages. These fraudsters request urgent payments to prevent 'threats' to intellectual property rights. Messages include personal information from public records such as names, business names or trademarks to appear legitimate. Sometimes, the sender claims to be an intellectual property expert, attorney or agent, or the Canadian Intellectual Property Office (CIPO).

To combat this rampant scam, in 2025 CPATA:

- published an alert on its website (including the fraudulent names, business names, websites and phone numbers used in scams to help individuals identify scams).
- answered **194 expressions of concern** from individuals.
- worked with authorities to shut down fraudulent websites.

In addition to this circulating scam, staff investigated and addressed **14 other concerns** related to unauthorized practice.



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.

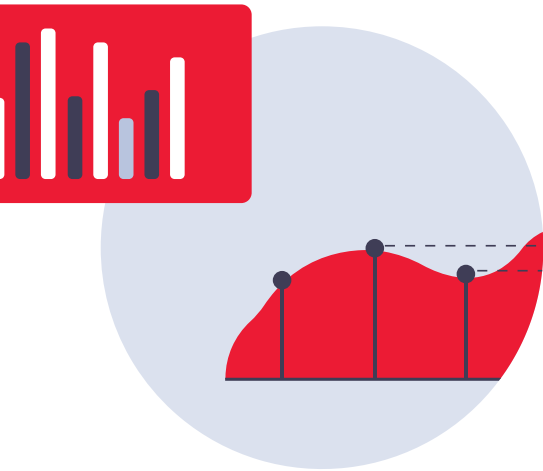


Funding Model and Budget Process

CPATA is an independent, professional regulator. The College's funding comes exclusively from fees, 90% of which are licence fees. The remaining funding comes from exam fees, application and certificate fees, and interest income. CPATA has never received funding from the Government of Canada or other sources.

CPATA is set up as a corporation without share capital under the CPATA Act. The overarching budget principle is to have sufficient funds to meet our statutory mandate and provides long-term stability for the organization.

CPATA is transparent about its budget processes, and all budgets are publicly available on [this page](#). CPATA's annual budgets for the following year are approved by the Board of Directors at its public December meeting. All materials for CPATA's Board of Directors meetings are made public prior to the meeting on [this page](#).



Revenue Budget

CPATA's revenue budget is calculated by multiplying the projected number of licences expected by the licence fee amounts, then adding additional revenue from exam fees, application and certificate fees and interest income. As CPATA's budget is approved in December for the following year, and the licence renewal period is between February and March, CPATA's revenue budgets must be based on projected numbers of licences (and agents).

Expense Budget

CPATA's expense budget is built on a zero-based budgeting method. This means CPATA strives to match income with expenses as closely as possible. Expenses are based on prior regulatory experiences regarding core ongoing regulatory functions such as setting exams, the number and nature of complaints and unauthorized practice matters and considering program costs for specific initiatives such as policy development of continuing professional development requirements or resource development for trainees and supervisors.

Financial Reserves

Regulators require financial reserves to ensure the stability, continuity and resilience of the organization. In 2024, CPATA established two separate reserve funds. The **Operating Reserve Fund** was set up to support the College's day-to-day operations. The **Professional Regulation Reserve Fund** (renamed the **Professional Regulation, Unauthorized Practice and Litigation Reserve Fund** in 2025) was set up to support the College's professional regulatory costs, including legal fees, investigations, complaints, discipline and unauthorized practice matters.

Updated Financial Reserve Targets

Initial target amounts were established in 2024 for CPATA's start-up and scale-up phases at 3-6 months of operating expenses for the Operating Reserve Fund and \$750,000 for the Professional Regulation, Unauthorized Practice and Litigation Reserve Fund. In 2025, a thorough review of the reserve policies and information of over 50+ regulators was undertaken to update CPATA's target amounts to be appropriate for the long term. The updated Financial Reserves Policy approved by the Board of Directors at its December 2025 meeting sets the new target amounts at a minimum of 6 months operating expenses for the Operating Reserve Fund, or \$1,600,000 for 2026, and \$2,000,000 for the Professional Regulation, Unauthorized Practice and Litigation Reserve Fund (combined \$3,600,000 for 2026). At the end of 2026, CPATA expects to meet these reserve targets, if we do not need to withdraw from these funds in the meantime.



2025 Financial Reports

The financial information presented below is an extract from CPATA's 2025 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 2025 are available at www.cpata-cabamc.ca/financial-reports.

CPATA's Financial Position

	December 31, 2025	December 31, 2024
Assets	\$ 3,257,006	\$ 1,900,295
Liabilities	\$ 150,770	\$ 175,011
Net assets	\$ 3,106,236	\$ 1,725,284
Liabilities and net assets	\$ 3,257,006	\$ 1,900,295

CPATA's Operations and Net Assets

	2025	2024
Revenues	\$ 3,938,878	\$ 3,904,104
Expenditures	\$ 2,557,926	\$ 2,471,118
Excess (deficit) of revenues over expenditures	\$ 1,380,952	\$ 1,432,986
Net assets, beginning of the year	\$ 1,725,284	\$ 292,298
Net assets, end of the year	\$ 3,106,236	\$ 1,725,284

Revenue Notes

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

- In order to do this, licence fees were similar to 2024 and increased by CPI (2%) for 2025. Fee revenue was static from 2024 (\$3,583,148) to 2025 (\$3,583,428). Slightly fewer Class 1 licences were offset by an increase in Class 3 and 4 licences.
- 2025 saw the continuation of the new Qualifying Examinations, including the Knowledge Exams and Skills Exams. There was a 10.6% increase in exam revenue, which was due to the 2% CPI increase in exam fees and an increase in the number of exam writers.
- The fee income enabled CPATA to increase investment in Guaranteed Investment Certificates (GIC's) and resulted in additional interest income. As CPATA looks to achieve its financial reserve targets, the ability to invest funds will increase and should provide income for the future.
- The number of applications and resulting fee income decreased slightly over the previous year due to a decrease in the number of agents requesting changes to licences.
- Decisions of the Discipline Committee have led to the recovery of a portion of the costs from hearing processes in the same amount as 2024 (\$5,000).

Expenditure Notes

In 2025 CPATA maintained tight control over expenses, seeing only a 3.5% increase over 2024. With the continued development of programs and services, expenses were still kept under budget by 28% (\$303,000).

- Board of Directors travel and meeting costs increased from the prior year as an additional in-person meeting was added to work on the new Strategic Plan.
- Communications costs increased in 2025 to accommodate the development of Code of Conduct education videos and a more robust digital communications approach.
- Legal fees decreased in 2025 as some discipline matters did not require legal support or hearing panels.
- Exam support remuneration decreased compared to 2024 as the redeveloped exams are fine-tuned and as the remuneration system is reconfigured to ensure adequate compensation of Exam Advisory Group members.
- Consulting fees related to the development of the new Qualifying Examinations and the Competency Profiles decreased for 2025 as projects continue to evolve. Costs for supervised practice training program supports will increase in 2026.
- Salaries and benefit costs increased in 2025 as staff received modest increases, and financial services support was brought in-house with the hiring of a part-time CFO. This resulted in decreased finance and accounting costs.
- Translation fees increased over the prior year as additional costs were incurred for the new exam program including candidate orientations and the development of new and expanded materials in both official languages.

Governance

CPATA's modern governance structure, comprising a highly skilled Board and dedicated Committees, adheres to recognized standards of 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 Industry, 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.
- Former 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.



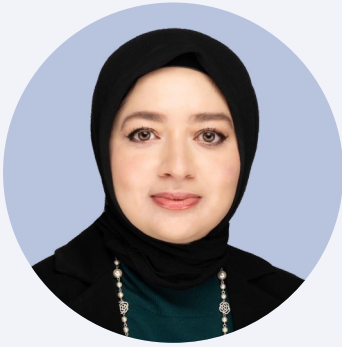
Iris Almeida-Côté | *Quebec*

- 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 (IIACGAP) 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 (LLM) 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*

- Managing Director, Strategic Policy and Advisory, Office of the CEO, CIBC.
- Amber has held executive positions in oil and gas, the public sector and in cleantech, including as the executive lead on developing an intellectual property strategy for clean tech entrepreneurs.
- 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.
- Recipient of the Ontario Bar Association President's Award for significant contribution to the advancement of justice in Ontario and elsewhere.

Elected Directors



Anne-Abigaïl Fils-Aimé Trademark Agent in Training Director *Quebec*

- Intellectual property portfolio manager and trademark agent in training, with over six years of legal experience in business law and intellectual property.
- Expertise in strategic management of intangible asset portfolios, including trademarks, patents and copyrights, as well as in the protection, valuation and commercialization of IP assets in Canada and internationally.
- Advanced training in law and public policy (DESS post-graduate diploma, QC) and member of the Ordre des administrateurs agréés du Québec (Adm.A.), with a keen interest in governance, regulatory and public policy issues related to intellectual property and innovation.

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

- Retired Patent agent, Trademark agent, lawyer (Ontario, B.C. and Alta) and 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.

**Dennis R. Haszko** | Patent Agent Director

- Senior cross-border IP leader with 25+ years of experience overseeing complex U.S. and Canadian patent portfolios across technology-driven industries, including electrical, software, and medical devices.
- Strategic advisor with examiner-level insight, leveraging former USPTO Patent Examiner experience to guide risk-aware patent strategy, due diligence, licensing, and litigation support aligned with organizational objectives.
- Experienced governance contributor and mentor, with a record of building and leading IP teams, modernizing systems and processes, and providing trusted guidance to executives, boards, and emerging companies.

**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 and Working Group

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*

Peter Cowan

Karima Bawa

Amber Batool

Steve Garland

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*

Iris Almeida-Côté

Scott Jolliffe

Maureen Rogers

CEO & Registrar's Annual Performance and Compensation Review Working Group

This working group was established by the Board to annually plan and undertake the annual performance and compensation review of the CEO and to report its findings and recommendations to the Board.

Ruth McHugh – *Chair*

Tom Conway

Scott Jolliffe

Bob Plamondon

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 Piro – *Chair*
Alessandro Colonnier
Heidi Jensen
Hilary Rose
Craig Macmillan
Tina McKay
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
Kiril (Liam) Grigoriev
Teresa (Terry) Jaenen
Barb Murchie
Karol Pawlina
Len Polsky

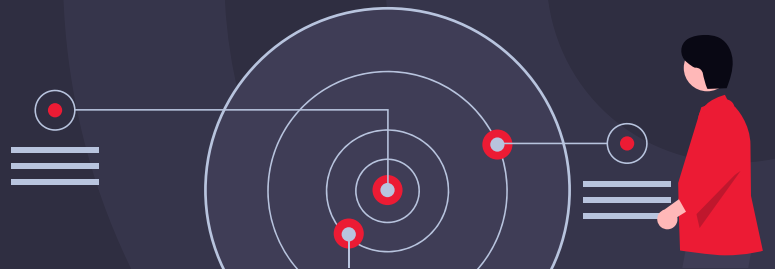
Discipline Committee

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
Susan Boulter
Guy Joubert
Sam Lanctin
Jean Whittow
Benoit Yelle

Looking Forward: 2026–2028 Strategic Framework

Building on its Strategic Framework 2023–2025, CPATA’s priority is to continue to provide public access to a globally-respected body of patent agents and trademark agents who are highly skilled, ethical, and current in their knowledge.



Professional Development and Competency

Enhancing pathways into the professions

- Continue to develop supervised practice resources
- Continue exploring potential new entryways into the professions
- Develop return to active practice requirements

Strengthening licensee competencies

- Develop a continuing professional development (CPD) policy
- Develop CPD, ethics education and practice management resources

Promoting pro bono

- Introduce a pro bono policy as contemplated by CPATA’s By-laws as part of CPATA’s commitment to facilitating access to services

Professional Regulation

Advancing patent agent and trademark agent privilege

- Support the continued evolution of patent agent and trademark agent privilege in a manner that protects clients in the public interest

Addressing complaints and discipline

- Continue to manage agent conduct inquiries, complaints, investigations and discipline in a proactive, principled and proportionate manner

Protecting against unauthorized practice (UAP) and fraud

- Continue to educate, coordinate and proactively work to prevent UAP and fraud

Relationships and Communications

Engaging with licensees and partners

- Continue to engage with licensees, associations, IP partners and other regulators on areas of shared purpose

Engaging with government

- Continue working with the Government of Canada (GoC), particularly ISED and CIPO to fulfill our mandate

Building CPATA's position in the IP ecosystem

- Continue to bring awareness to CPATA's role, public interest mandate and best-in-class approach

Governance

Continuing to address fiscal responsibility and sustainability

- Right-size annual licensing fees, with consultation, to provide CPATA with the budget required to fulfil its mandate
- Implement By-law changes regarding fees

Regulating via effective Board and Committee governance

- Appropriately support Board and Committees
- Continue Board/Committee education and evaluation

Maintaining Board and Committee composition

- Conduct Director elections (2027, 2028)
- Support GoC regarding Minister appointments
- Recruit for skills-based Committee appointees

Organizational and regulatory infrastructure

Continuing to develop infrastructure for CPATA to be a right-touch, best-in-class

- Continue to balance people, processes and technologies to operate efficiently and in the public interest

Understanding licensee demographics and consumer needs

- Analyze CPATA data and work with partners to understand trends, consumer needs and gaps

Advancing EDI and Indigenous Reconciliation

- Continue to develop CPATA's Equity, Diversity and Inclusion, and Indigenous Strategies Reconciliation



"Our Strategic Plan reaffirms CPATA's central commitment: to serve the public interest by upholding the highest standards of integrity and expertise among patent agents and trademark agents, and by fostering a regulatory environment that advances Canada's innovation ecosystem."

Ruth McHugh | Chair



COLLEGE OF PATENT
AGENTS & TRADEMARK AGENTS

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

Contact Us

cpata-cabamc.ca