New Horizons in Brand Architecture

Agenda

12:00pm • Registration Opens

1:00pm • Program Welcome & Presentations

Licensing: The CMO’s Path to Winning on the Retail Battlefield
Michael Stone, Chairman & Co-Founder, Beanstalk

Marketplaces and New Ecosystems for Brand Licensing
Nate Cavanaugh, Co-Founder & CEO, Brainbase

Contracts Talk: Are They Telling The Story You Want
Lewis Stark Partner, Prager Metis CPAs Contracts

Social Media and Legal Pitfalls
Jessica Cohen, Associate & Lee J. Eulgen, Partner Neal Gerber Eisenberg

China: Helping You Sleep at Night
Scott Stern President & CEO, Norscot Group

Trends in E-Commerce & Marketplaces and the Impact to the Licensing Industry
Trevor George, CEO, Trevco & CEO, Bluwheel Media
Leon Marachi, Director of Retail Development, Cartoon Network Enterprises

3:30pm • Gold-Sponsored Networking Break

4:00pm • Presentations & Panel Discussion

Accelerating Your Licensing Program: BMW Case Study
Teri Niadna, Managing Director, Europe

Becoming More Engaged with Agents To Improve Your Licensing Knowledge
Marty Malysz, President, Dependable Solutions

Tales from the Wild: How to Avoid Common Financial Pitfalls
Debora Stewart, CPA & Managing Director, Invotex IP – Royalty Audit Experts

Maximizing Anticounterfeiting Strategies in Licensing Relationships
Pamela Deese, Partner, Arent Fox

A New Lens for Brand Protection Strategies
Mike Dunn, Founder & President, Octane5

6:00pm • Platinum-Sponsored Networking Reception
# New Horizons in Brand Architecture

## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00pm</td>
<td>Program Welcome &amp; Presentations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Licensing: The CMO's Path to Winning on the Retail Battlefield</td>
<td>Beanstalk</td>
</tr>
<tr>
<td></td>
<td>Navigating the marketing ecosystem</td>
<td>Michael Stone</td>
</tr>
<tr>
<td></td>
<td>• How licensing entangles brands and consumers</td>
<td>Chairman &amp; Co-Founder</td>
</tr>
<tr>
<td></td>
<td>• Selling the benefits of licensing to the C-suite</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Marketplaces and New Ecosystems for Brand Licensing</td>
<td>Brainbase</td>
</tr>
<tr>
<td></td>
<td>New technology requirements for the new world of licensing, and</td>
<td>Nate Cavanaugh</td>
</tr>
<tr>
<td></td>
<td>how to get ahead</td>
<td>Co-Founder &amp; CEO</td>
</tr>
<tr>
<td></td>
<td>• Growing your licensing business outside of the Licensing Expo</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Why the licensing growth and management functions should be</td>
<td></td>
</tr>
<tr>
<td></td>
<td>linked</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Leveraging AI and machine learning for licensing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contracts Talk: Are They Telling The Story You Want</td>
<td>Prager Metis CPAs</td>
</tr>
<tr>
<td></td>
<td>• Understanding how certain contractual language affects your</td>
<td>Lewis Stark</td>
</tr>
<tr>
<td></td>
<td>licensing program enables licensors to draft a more effective</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>and profitable agreement!</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Use contract language to influence licensee behavior, protect</td>
<td></td>
</tr>
<tr>
<td></td>
<td>your IP, control rights and maximize revenue.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Caution! The use of accounting and auditing “buzz words” may</td>
<td></td>
</tr>
<tr>
<td></td>
<td>have unintended ramifications.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Don't forget the “Forgotten Provision”! Why you will need a</td>
<td></td>
</tr>
<tr>
<td></td>
<td>robust audit provision one day!</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Social Media and Legal Pitfalls</td>
<td>Neal Gerber Eisenberg</td>
</tr>
<tr>
<td></td>
<td>New Challenges for Licensors in the Online World</td>
<td>Jessica Cohen</td>
</tr>
<tr>
<td></td>
<td>• Maintaining sufficient control over brand</td>
<td>Associate</td>
</tr>
<tr>
<td></td>
<td>• Avoiding liability for Brand Owners</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Insurance and Indemnification</td>
<td>Lee J. Eulgen</td>
</tr>
<tr>
<td></td>
<td>• Royalties, Accounting and Tax Implications of Online Sales</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>• Licensee-Retailer Interaction</td>
<td></td>
</tr>
<tr>
<td></td>
<td>China: Helping You Sleep at Night</td>
<td>Norscot Group</td>
</tr>
<tr>
<td></td>
<td>Learned best practices from the field related to:</td>
<td>Scott Stern</td>
</tr>
<tr>
<td></td>
<td>• Sourcing factory</td>
<td>President &amp; CEO</td>
</tr>
<tr>
<td></td>
<td>• Manufacturing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Distribution: Chinese certifications</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Counterfeit products: selling out the back door &amp; how to prevent it</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Remedies</td>
<td></td>
</tr>
</tbody>
</table>
Trends in E-Commerce & Marketplaces and the Impact to the Licensing Industry
How the recent trends in e-commerce and marketplaces such as Amazon are impacting the licensing industry, licensing deals, the e-retail landscape and what licensors can do about it. Then, join Trevor in a fireside chat and gain insights in e-commerce with Leon.

3:30pm • Gold-Sponsored Networking Break

Accelerating Your Licensing Program: BMW Case Study
• Strategy & Brand Insight
• Elevated Partnerships
• Product Development Expertise
• Efficiencies & Quality
• Future Proof Your Retail

Becoming More Engaged with Agents To Improve Your Licensing Knowledge
• Closer interaction with agents to improve your licensing processes.
• How to secure information with each agent.
• Approving new licensees and contracts through agents.
• Streamlining product approvals with agents in each territory.
• Gathering royalty details and forecasts from agents.
• Knowledge transfer-New agents picks up when the prior agents contract expires.

Tales from the Wild: How to Avoid Common Financial Pitfalls
• Royalty Audit Statistics and what they mean to you
• Crazy audit experiences – what can be learned from the field
• Best practices letter example to achieve better royalty compliance

Maximizing Anticounterfeiting Strategies in Licensing Relationships
• Trademark Abuse
• The Cost of Counterfeit Goods
• Infringements and explore
• What IP Owners and Licensees Can Do to Reduce Counterfeits
• License Provisions that Reduce Counterfeiting
• Registering Trademarks
• Educating Customers
• Combating Online Counterfeiting

A New Lens for Brand Protection Strategies
• Who is affected?
• Social Issues
• Brand Value Impact
• Best Practices
• Product Marking
• Marks Registration
• Litigation and enforcement
• Education

6:00pm • Platinum-Sponsored Networking Reception
New Horizons in Brand Architecture
Academic Forum. Premier Networking™

Presenters | Platinum Sponsors

brainbase

Nate Cavanaugh is the co-founder and CEO of Brainbase, a licensing technology startup backed by leading investors in Silicon Valley, LA and Europe. Brainbase is the creator of Marketplace, a new platform to showcase your brands and products, connect with new licensing partners and close deals entirely online, and Assist, the best tool to manage your existing licensing business.

Nate Cavanaugh
Co-Founder & CEO
nate@brainbase.com
www.brainbase.com

Dependable Solutions

Marty Malysz is the President of Dependable Solutions, Inc. (DSI) managing a team of 28 professionals to ease the challenges associated with brand licensing. Marty works in licensing, creative and royalty automation and enjoys living in Los Angeles with his wife, daughter and son. He leads discussions in licensing at many universities and past SPLiCE events. Marty is a past LIMA board member and is a contributor to the updated The Business of Licensing book. DSI offers a portfolio of software applications that automate contract management, financial, royalty and creative operations through web-based solutions for licensors, agents and licensees. DSI is the #1 solution vendor for your automated licensing, approval and financial compliance processes to 60 clients worldwide.

Marty Malysz
President
mmalysz@dependablerights.com
www.DependableRights.com

InvotexIP

Debbie Stewart is a CPA and the Managing Director of InvotexIP, a consulting firm that specializes in royalty compliance. Debbie has been working in the Intellectual Property Consulting world for over 30 years. Arguably, Debbie has personally managed more royalty audits than anyone else in the industry. The firm’s practice philosophy is one of polite persistence. Her firm is known for their publications of their royalty audit findings statistics as well as their ability to uncover large underpayments while relationships are preserved. With a dedicated staff of experienced royalty audit experts and resources around the world, InvotexIP works with some the world’s most prestigious universities and research institutions, the world’s largest for-profit licensing organizations, and Fortune 500 companies.

Debbie Stewart
CPA & Managing Director
dstewart@InvotexIP.com
www.InvotexIP.com
Mike Dunn co-founded Octane5 in 2009, after spending over 13 years developing market-leading online brand management and workflow approval systems. In addition to the digital services, Mike built a fully integrated manufacturing facility that had holographic, print production, and finishing capabilities. Mike was a co-inventor on the two patents covering the process of making overprinted holographic hang tags that is currently used on over 1 billion hang tags globally. Mike was instrumental in developing the global partnership with De La Rue, the world's largest commercial security printer. Through this partnership, the “THREADS” line of sticker and hang tags was developed exclusively for the licensing industry. THREADS employs currency-grade paper technology that is on the leading edge of brand protection. It is currently being utilized by global brands such as Ford, Caterpillar, The PGA TOUR and Harley-Davidson to protect their licensing merchandise. Mike also was the co-architect of the brandcomply.com licensing management system. During his career, Mike developed systems and programs for clients such as NASCAR, The National Hockey League, The Collegiate Licensing Company (CLC) and the PGA TOUR. The CLC brand management and protection program, created in 2002, was the largest in the licensing industry encompassing more than 200 brands, 3500 logos, 2500 licensees, over 100 holographic SKU’s and 100+ million holographic units annually. Mike has been a featured speaker on licensing and brand protection topics at numerous industry events such as SPLiCE, LiMA Mind Mix, the annual Collegiate Licensing Seminar, John Deere licensing symposium, and Anti Gray Market Association.

Mike has a Bachelor of Science from Georgia State University, and two sons.

Scott Stern is the President and CEO of Norscot Group, Inc., one of the leading promotional products companies in the USA. Over Scott’s 40-plus year career in the industry, he has developed an unmatched expertise in all aspects of promotional product merchandising. That expertise is built on Scott’s considerable experience in the areas of global licensing, brand identity programming, global sourcing, design and production of promotional products, manufacturing of scale model replicas, direct marketing via catalog and eCommerce, and domestic and international distribution. Scott is an innovator, having started up several related businesses. He is always looking beyond today’s products, trends and delivery systems to anticipate needs and seek out new opportunities in order to best serve Norscot’s valued client partners.

Norscot is a family business headquartered in Mequon, Wisconsin, in the northern suburbs of Milwaukee. Founded in 1970, Norscot specializes in the development of turnkey marketing and fulfillment programs, working with some of the most iconic brands in America to advance their products, services and images. In addition to the corporate headquarters in Mequon, which includes a 100,000 square foot warehouse and fulfillment center, Norscot currently has sales offices in Chicago, Peoria, Detroit, and Savannah; and the company maintains a sourcing and quality control office in Hong Kong. Under Scott’s leadership, Norscot established international sales and fulfillment operations in the UK and China in the 1990’s, with additional sales outlets in Europe and the Middle East, successfully operating those divisions until their sale in 2015.

Scott and his wife live in Mequon, and they have two adult children. A lifelong Wisconsinite, Scott is a graduate of the University of Wisconsin—Madison and is a loyal fan of the Packers, Brewers, Bucks and Badgers. He enjoys the frustration of golf, vintage rock and roll, and occasional karaoke singing.
Pam Deese is a partner in the IP Practice Group at Arent Fox in the firm's DC office. Her intellectual property representation includes counseling IP owners in developing and maintaining strategic licensing programs as well as maintaining IP portfolios. Among other things, she provides counsel with respect to the creation, negotiation and enforcement of licenses and related agreements, management of worldwide IP rights, as well as representation involving counterfeiting issues, advertising, promotions, celebrity endorsements, and litigating related business disputes. Pam is in her fourth year as an adjunct professor at American University's Washington College of Law where she teaches IP Licensing.

Michael Stone serves as chairman and co-founder of Beanstalk, a leading global brand licensing agency that is a part of Omnicom Group. He is also the author of The Power of Licensing: Harnessing Brand Equity (Ankerwycke, 2018). Michael has been instrumental in driving the evolution of licensing from primarily an entertainment marketing tool to a highly effective corporate marketing and communications tool used by many of today’s Fortune 500 companies. Michael has been a leader in all facets of licensing, developing brand extension programs for major multinational corporations as well as celebrities, sports and entertainment properties, including retail exclusive programs devoted to specific licensed properties.

Teri Niadna is responsible for Brandgenuity's European business. Brandgenuity was founded in 2003 and extended its footprint to Europe in 2015. The European office offers full service licensing solutions with hands-on partner involvement for each client. Clients include a mix of corporate trademark and entertainment brands, including BMW, the NFL Players Association, Anheuser-Busch Inbev, Viacom, and many more. Prior to joining Brandgenuity, Teri spent six years overseeing the NFL’s global consumer products business, completing a re-launch of the international apparel business and producing unprecedented growth for the business. Based in London, Teri devised strategies to grow the licensing businesses and executed initiatives alongside the NFL's international MD's and global partners, such as Nike, New Era, EA Sports, and Wilson.
Leon Maratchi is the Director of Retail Development for Cartoon Network Enterprises (CNE). He began his career in licensing as an intern for CNE in 2008 and was hired upon graduating from Brooklyn College. In his current role, he oversees all aspects of CNE’s retail business, including the development and implementation of domestic retail strategies, programs and promotions to maximize growth opportunities across all lines of business and retail channels. He has spearheaded the launch of world-class merchandise programs for brands such as Ben 10, The Powerpuff Girls, Adventure Time and Rick and Morty. Leon has also led the expansion of CNE’s merchandise programs through growth at non-traditional and e-commerce retailers.

Trevor George is the CEO of Trevco, a top 150 licensee, and Founder & CEO of Blue Wheel Media, a digital marketing agency. After helping reinvent Trevco through print on demand & technology in 2007, Trevor helped take the company direct-to-consumer on Amazon in 2016. Fast forward to today, Trevco is one of the largest 3rd Party (3P) sellers on Amazon in the USA. Trevor is one of the licensing industry’s 40 under 40 influentials of 2019 and has recently been featured in Business Insider, Entrepreneur Magazine, Internet Retailer, Search Engine Land, DigiDay, and much more for his insights on e-retail.

Jessica Cohen is an intellectual property associate whose practice focuses on protecting and policing clients’ trademark, trade dress and copyright rights. Jessica counsels clients in all aspects of their branding, advertising and enforcement needs. She specializes in trademark counseling for clients in a wide variety of industries, including consumer home goods, food products, tobacco products, hospitality/restaurant services, online services.

Lee J. Eulgen is an intellectual property litigator and advisor who manages sophisticated portfolios for clients with worldwide operations. His practice includes the full range of intellectual property dispute and transactional matters, with an emphasis on trademark, copyright, trade secret, trade dress, privacy and litigation. He is member of the firm’s Executive Committee. Lee serves as lead counsel before state and federal courts and administrative agencies throughout the country, and he also coordinates efforts to resolve similar international disputes.

Lewis Stark is a Partner in the Royalty Audit & Contract Compliance Group of Prager Metis CPAs, LLC, and a member of Prager Metis International. He has more than 25 years of experience in public accounting. He is a Certified Public Accountant and a Certified Fraud Examiner. Mr. Stark specializes in conducting royalty, distribution, and profit participation audits in connection with the licensing of copyrights, trademarks, patents and brands; and in connection with personal services provided pursuant to recording, songwriting, publishing administration, co-publishing, acting directing/producing agreements. His specialties also include performing financial due diligence reviews and providing expert witness testimony.