



IA Finance Best Practices

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24-26 September 2007, IA Finance Best Practices

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The IAFS, in collaboration with the Intellectual Asset Management magazine Finance Panel, is sponsoring a bespoke working session on intangible asset finance best practices at the [Savannah Dhu](#) Wildlife Preserve, Pines Lodge, and Conference Center among the finger lakes in [Clyde, NY](#).

24 Sept

	Activity	IAFS Council	IAFS Committee Chairs	IAFS General Membership
16h45	Arrival/Room Assignments			
17h00	Evening Cocktail Reception, Welcome			
18h30	Fine Dining		Keynote Speaker William T. McGinty Carpenter Moore Insurance Agency (A NASDAQ Company)	
20h00		IAFS Council Annual Meeting	Charge to Working Groups	Networking

25 Sept

06h15	Wildlife Preserve/Tour of Ground /Recreation			
07h30	Breakfast			
08h00	First Working Session: Panel Presentations (provisional program)	Security Asset Management Panel Scott McHugh, Wal-mart Craig Hoffman, Nexcen Brands Martin Ross, Global Security Consortium Jay Eisbruck, Moodys Robert Liscouski, Steel City Re, <i>Moderator</i>		
09h15		Intellectual Property Asset Management Panel Larry Friedman, formerly Bayer Marc Lucier, Deutsche Bank		

David E. Gould, Buchanan Ingersoll & Rooney
 Kim Cauthorn, Samian Insurance
 David Hetzel, Motorola, *Moderator*

10h30		Quality & Integrity Asset Management Panel Alfred Fasola, formerly Gateway plc Richard Pietrafesa, Destiny USA David Ruder, Bull Terrier Investments LLC Judith Giordan, formerly Pepsico and Henkel Darren Cohen, Reed Smith, <i>Moderator</i>	
12h45	Fine Dining		
13h45	Second Working Session: Committees		Framing IAM best practice guidelines
17h45	Cocktails	Presentations from Committee Working Sessions and Critiques	
19h15	Fine Dining		
20h45	Third Working Session: Committees		Respond to Critiques
26 Sept			
07h00	Working Breakfast	Second Presentation from Committee Working Sessions and Critiques	
08h30	Concluding Remarks		
09h00	Departure		

About the Keynote Speaker

William McGinty is the Senior Managing Director, NASDAQ Insurance Agency. The Agency is an insurance intermediary advising current and future NASDAQ companies concerning specialty insurance coverage including Directors and Officers liability, Errors and Omission Insurance, EPLI, M&A and Patent Insurance as well as other Property and Casualty insurance products. Bill, a founding member of the firm, is responsible for M&A activities and strategic planning. Previously, Bill was a founding partner and served as President and COO of American Wholesale (currently operating as AMWINS), a national Property & Casualty and Employee Benefits Insurance firm. He currently is a board member of Steel City Re. Bill received a J.D. from Fordham University School of Law after graduating magna cum laude with a BA from Long Island University and has been active with the New York Bar and the Professional Liability Underwriting Society.

About the Panel Moderators

Robert Liscouski is a partner with the security-centric private equity firm, Centurion Holdings and a senior

executive with Steel City Re, LLC, an enterprise value assurance company. He also is currently serving as a member of the Intelligence Science Board. Previously, he was the Assistant Secretary of Infrastructure Security, Department of Homeland Security, and before that, Director of Information Assurances at the Coca-Cola Company. Earlier in his career, he served as a Criminal Investigator for the Bergen County Prosecutors Office and as a Diplomatic Security Service Special Agent with the U.S. Department of State.

David Hetzel is the manager of IP divestitures and acquisitions with the mobile devices business of Motorola, a diversified electronic products company, where he leads a cross-functional team in performing deal due diligence and financial valuations on patent portfolios. His duties call for him to develop and manage internal processes critical to evaluation of divestiture/acquisition opportunities, and to communicate across multiple Motorola communities – business, technical, legal, licensing, etc. He is also responsible for leading strategic IP initiatives aimed at improving the management of patent assets and maximizing value.

Darren Cohen is a partner in the Intellectual Property Practice Group of Reed Smith, a global law firm, where he oversees programs designed to secure and protect thousands of domestic and international trademarks. He provides counsel to advertising agencies and brand owners on all matters of trademark and copyright law. Darren began as a Trademark Examiner/Advisor at the U. S. Patent and Trademark Office, where he was awarded the Department of Commerce Bronze Star for excellence. Darren is recommended for his experience on the brand strategy front and for advising advertising clients on trademark matters by The Legal 500 directory.

Other Details

The program, open to IAFS [members](#) on a preferred basis, will run from the evening of Monday 24 September through breakfast Wednesday 26 September 2007. Capacity at the Pines Lodge and Conference Center is limited. Early [registration](#) is encouraged.

The Society is unable this year to provide ground transportation from Syracuse Hancock Airport. For driving directions to Savannah Dhu, [click here](#).

Conference registration includes room and board.

For more information including a registration form, [please click here to download the form](#), contact the Education Committee Chairman, Dr. Judith Giordan at judy@visionsineducation.com, or contact the Executive Secretary at secretariat@iafinance.org.