



Classification:  
Patent

## PT40 Other Patent-Related Tasks Code Set

Opinion preparation, portfolio analysis and management, assignments and security interests, and licensing.

- PT40.10      **Opinion Preparation**  
Completing formal legal opinions on the validity, enforceability, infringement, and/or non-infringement of a patent claim. Includes opinions on infringement of a client's patent by a non-client infringer.
- PT40.15      **Portfolio Analysis and Management**  
Reviewing, analyzing, documenting, and managing a portfolio of patents. Includes patent "due diligence" during transactional analysis.
- PT40.20      **Assignments and Security Interests**  
Negotiating and preparing assignment (i.e. previously registered or filed application) or security interest, including review of file history, checking status and meeting with client.
- PT40.25      **Licensing**  
Negotiating and preparing license.
- PT40.30      **Exemplar and Exhibit Disposition**  
The retention, storage and proper disposition of property and exemplars (models).