YOUR  
LOGO

**COMPANY NAME**

INTELLECTUAL PROPERTY AUDIT PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to conduct an Intellectual Property (IP) audit. We specialize in assessing and managing IP assets to protect innovation, ensure compliance, and maximize value.  
  
This proposal outlines our approach to delivering a comprehensive IP audit for [Client Name].

# Project Objectives

The primary goals are:  
  
- Identify and categorize existing IP assets  
- Assess the protection status and legal compliance of IP holdings  
- Detect potential risks, gaps, and infringement issues  
- Provide strategic recommendations for IP portfolio optimization

# Proposed Services

Our IP audit services include:  
  
- Comprehensive inventory of patents, trademarks, copyrights, and trade secrets  
- Review of IP ownership, registration, and licensing agreements  
- Analysis of IP usage, enforcement, and infringement risks  
- Strategic recommendations for IP management and monetization  
- Support for compliance with IP regulations and best practices

# Scope of Work

Scope includes:  
  
- Initial consultation to define audit objectives and scope  
- Collection and review of IP documentation  
- Interviews with key stakeholders and legal advisors  
- Preparation of audit report with findings and recommendations  
- Presentation of results and strategic advisory

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Planning & Data Collection | Define objectives and gather IP documentation | [Start Date] |
| Review & Analysis | Conduct detailed IP assessment and identify risks | [Date] |
| Reporting & Recommendations | Prepare audit report with findings and strategic advice | [Date] |
| Presentation & Advisory | Present results and provide ongoing support | [Completion Date] |

# Pricing

Estimated cost breakdown for IP audit services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| IP Inventory & Documentation Review | Compile and assess IP assets and agreements | [Amount] |
| Risk Analysis & Compliance Check | Identify potential infringement and compliance gaps | [Amount] |
| Strategic Recommendations | Provide actionable advice for IP management | [Amount] |
| Final Reporting & Presentation | Deliver audit report and executive summary | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a leading consultancy in intellectual property management and protection.  
  
- Experience: [X] years in IP audits, legal advisory, and portfolio management  
- Expertise: IP due diligence, risk assessment, licensing, and enforcement  
- Mission: To help businesses safeguard their intellectual assets and leverage them for competitive advantage

# Case Studies / Testimonials

Case Study: [Client Example]  
  
- Project: IP audit for a technology company preparing for acquisition  
- Outcome: Identified critical gaps, secured additional IP protections, and enhanced valuation  
  
Testimonial:  
“[Your Company Name] conducted a thorough IP audit that provided invaluable insights and strengthened our position during negotiations.” — [Client Contact]

# Terms and Conditions

Payment Terms: [X]% deposit, milestone payments.  
Service Scope: Includes audit, analysis, reporting, and strategic advisory.  
Client Responsibilities: Provide access to IP records, contracts, and internal stakeholders.  
Adjustments: Scope changes require mutual agreement and may affect cost and timeline.

# Acceptance

To approve this intellectual property audit proposal and initiate services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client Name]  
Title: [Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_