# IP VERIFICATION CHECKLIST

## A) Identity / Entity

- ☐ Owner legal name matches entity docs (ID / Articles / EIN letter if applicable)
- ☐ Authorized signer confirmed (member/manager/officer)
- ☐ Primary contact email + phone verified

## B) Asset Classification

- ☐ Asset type confirmed: patent / software / hardware / trademark / trade secret / copyright
- ☐ Jurisdictions confirmed
- ☐ Status confirmed (filed/published/granted/etc.)

## C) Chain of Title / Ownership Proof (MOST IMPORTANT)

### Patents

- ☐ Patent / application numbers provided
- ☐ Filing receipts / publication links (USPTO/WIPO/etc.)
- ☐ Recorded assignments (USPTO assignment record or equivalent)
- ☐ If invented under employment/contract: invention assignment agreement provided
- ☐ Co-inventors identified and assignment to Owner confirmed (or missing items flagged)

### Trademarks

- ☐ Registration/app numbers + class list
- ☐ Specimen/use evidence if needed
- ☐ Ownership entity matches filing/record

### Software

- ☐ Repo links + commit history
- ☐ Contributor list (employees/contractors)

- ☐ Contractor IP assignment agreements (work-for-hire)
- ☐ Open-source usage disclosed + license compliance status
- ☐ Third-party dependencies that restrict commercial licensing flagged

**Hardware / Designs**

- ☐ CAD/drawings provided (or summary packet)
- ☐ Design authorship/ownership confirmed
- ☐ Any manufacturer NDAs / restrictions disclosed
- ☐ Prior public disclosures noted (shows, sales, videos)

**Trade Secrets**

- ☐ Description of secret + why it is secret
- ☐ Evidence of reasonable secrecy controls (access, NDAs, storage)

## D) Encumbrances / Prior Grants

- ☐ Any prior licenses? (yes/no) + copies or term summaries
- ☐ Any assignments/sales? (yes/no)
- ☐ Any liens/security interests? (yes/no)
- ☐ Any university/government funding or grant obligations? (yes/no)
- ☐ Any "most favored nation" or exclusivity obligations? (yes/no)

## E) Disputes / Claims

- ☐ Demand letters / threats disclosed
- ☐ Pending litigation/arbitration disclosed
- ☐ Known infringement or third-party claims disclosed
- ☐ Insurance (if any) disclosed

## F) Marketability Inputs (for licensing)

- ☐ Plain-English value prop written (what it does, why it's better)
- ☐ Target licensee categories listed
- ☐ Competitors + comparable products listed
- ☐ Evidence: prototypes, demos, test data, customer interest, LOIs (if any)

## G) Atlas Admin Decision

- ☐ **Approved for intake**
- ☐ **Approved with conditions** (list conditions)
- ☐ **Hold / needs more proof** (list missing items)
- ☐ **Reject** (reason)

## H) Owner Attestation (recommended, signed)

"I certify that I own/control the IP listed and have authority to license it; information provided is accurate to the best of my knowledge; I will promptly notify Atlas of any material changes."

Owner: _____ Date: _____