INTA Managing Partners Retreat
The IP Firm Business Model in an Era of Disruption: People, Value, and Proof

Friday, November 20, 2026 · 9:00 AM–2:00 PM

Sheraton Phoenix Downtown, Phoenix, Arizona · 2026 INTA Leadership Meeting

By invitation only · Chatham House Rule Apply

About the Retreat

The inaugural INTA Managing Partners Retreat is an invitation-only forum for managing partners of IP and IP-focused law firms. Less conference and more candid conversation, the retreat brings together around 50 firm leaders from across the world to share experience, test ideas, and leave with clear priorities for their firms.

This year's program follows one connected conversation. Disruption, led by AI, is changing how work gets done and who does it (People). That puts pressure on the traditional business model (Value) and requires firms to show clients the value they deliver (Proof). Each discussion builds on the one before, combining short panels with roundtable discussions where peers share their own experiences on each panel's topics.

Before the retreat, participants complete the Managing Partners Pulse, a short anonymous survey on their pain points, AI adoption, talent, and the business of running a firm. The results shape the on-stage questions and are shared on the day, so every leader can see how their peers are responding. All sessions are held under the Chatham House Rule.

Attendance Commitment

Places at the retreat are limited and offered by invitation. Everyone who registers is expected to attend and to stay for the full program, from 9:00 a.m. to 2:00 p.m. The retreat is built not only around the panels but, above all, around the roundtable discussions that follow them, and their success depends on every seat being filled by an engaged managing partner from start to finish. If you can no longer attend, please let INTA know as soon as possible so your place can be offered to another firm leader.

Antitrust Notice

INTA is committed to full compliance with antitrust and competition laws in every jurisdiction. Participants are reminded that they lead competing firms and must not discuss or exchange information on, or reach any agreement or understanding about, fees, rates, pricing or billing terms; salaries, compensation or hiring terms; the allocation of clients, markets or territories; decisions to deal or not to deal with any client, supplier or competitor; or any other competitively sensitive information about their own firms. Discussions should stay at the level of general experience, trends and practices. Each firm makes its own business decisions independently.

Program at a Glance

Time	Format	Session
9:00 AM–9:15 AM	Opening	**Welcome and Opening Remarks**
9:15 AM –9:45 AM	Capsule Keynote	**Built to Last: An AI Industry CEO on Growth, Profitability, and Bold Decisions**
9:50 AM –10:25 AM	Panel 1	**When AI Does the Junior Work: How Firms Will Train, Staff, and Keep Talent**
10:30 AM –11:00 AM	Roundtable	**Roundtable: When AI Does the Junior Work – What Are You Seeing in Your Firm?**
11:00 AM –11:10 AM	Break	**Networking Break**
11:10 AM –11:40 AM	Panel 2	**Who Looks After the Leader? Managing Isolation, Stress, and Decision Fatigue at the Top**
11:45 AM–12:45 PM	Lunch Roundtable	**Lunch Roundtable: Who Looks After the Leader?**
12:45 PM–1:15 PM	Panel 3	**Show Me the Value: How Clients Judge Outside Counsel and Measure the Return on AI**
1:20 PM –1:50 PM	Roundtable	**Roundtable: Show Me the Value – How Is Your Firm Proving It to Clients?**
1:50 PM –2:00 PM	Closing	**Closing Remarks**
3:45 PM –4:45 PM	Networking	**Closing Cocktails**

Detailed Program

9:00 AM–9:15 AM | Welcome and Opening Remarks

Welcome Remarks

- Jennifer A. Van Kirk, Partner, Womble Bond Dickinson (USA), Co-Chair, Managing Partners Retreat
- Sheja Ehtesham, Managing Partner, ALG India Law Offices LLP (India), Co-Chair, Managing Partners Retreat

Introductory Remarks

- Etienne Sanz de Acedo, Chief Executive Officer, International Trademark Association (INTA)
- Barry Cohen, Royer Cooper Cohen Braunfeld LLC (USA), Chair, Law Firm Committee
- Sarah Bro, McDermott Will & Schulte (USA), Vice-Chair, Law Firm Committee

9:15 AM–9:45 AM | Capsule Keynote | Built to Last: An AI Industry CEO on Growth, Profitability, and Bold Decisions

A rare, intimate conversation with Girish Rishi, Chairman and Chief Executive Officer of Cognite, a leading industrial AI company that helps energy and industrial organizations turn data into actionable insights. Recently appointed to Cisco's board of directors, Rishi brings three decades of leadership across hardware, software, data, and AI. In a candid exchange you won't hear on a conference stage, he will challenge firm leaders to rethink growth, profitability, and client value as AI reshapes markets and business models. Drawing on his experience leading organizations through rapid technological change, he will explore how leaders can balance innovation with culture, adapt to evolving client expectations, build resilient talent strategies, and make bold decisions amid uncertainty. The conversation sets the stage for the day's discussions on profitability, AI, talent, and the IP firm of the future.

Moderator: Ken Van Winkle, Vice Chair, Womble Bond Dickinson (USA)

Keynote Speaker: Girish Rishi, Chairman and Chief Executive Officer, Cognite (USA)

9:50 AM–10:25 AM | When AI Does the Junior Work: How Firms Will Train, Staff, and Keep Talent

For generations, IP firms have been built as pyramids, with junior lawyers and paralegals learning the craft through prosecution, formalities, and docketing work. What happens when AI can do much of that work? Drawing on questions submitted by participants in the pre-retreat survey, managing partners from three continents discuss how firms will train the next generation, which new roles are emerging (from legal technologists to data and AI specialists), how formalities teams are changing, and how to recruit and keep great people. Panelists compare how firms of different sizes are responding, followed by questions from the room.

Moderator: Megan Carpenter, Dean Emeritus, UNH Franklin Pierce School of Law (USA)

Speakers:

- Sheja Ehtesham, Managing Partner, ALG India Law Offices LLP (India)
- Gustavo Giay, Chairman, Marval O´Farrell Mairal (Argentina)
- Luke Minford, Chief Executive Officer, Rouse (United Kingdom)
- Stuart Wood, CEO, Smart & Biggar (Canada)

10:30 AM–11:00 AM | Roundtable: When AI Does the Junior Work – What Are You Seeing in Your Firm?

Following the panel "When AI Does the Junior Work," participants break into small roundtables of leaders from different regions and firm sizes to discuss their own experiences and insights on the topics just discussed. Building on what the panelists shared, each table explores: how AI is already changing the work of junior lawyers, paralegals and formalities teams in their firms; how they are training the next generation when much of the traditional learning work is automated; which new roles they have created or plan to create; and what has and has not worked in recruiting and keeping great people.

11:00 AM–11:10 AM | Networking Break

11:10 AM–11:40 AM | Who Looks After the Leader? Managing Isolation, Stress, and Decision Fatigue at the Top

Leading a firm through constant change takes a personal toll that is rarely discussed. In this short, candid conversation, Sergio L. Olivares Sr. and Jenn Wilson of Canyon Ranch turn the spotlight on the managing partner as a person: the isolation of the top job, decision fatigue, setting boundaries while staying available to the firm, and where leaders themselves can turn for support. Drawing on experience in both law firm leadership and well-being, the speakers offer practical ways to sustain energy and judgment over the long term and set the stage for the lunch roundtable that follows.

Speakers:

- Sergio L. Olivares Sr., Partner, Olivares (Mexico)
- Jenn Wilson, Senior Director of Health and Performance, Canyon Ranch (USA)

11:45 AM–12:45 PM | Lunch Roundtable: Who Looks After the Leader?

Following the panel “Who Looks After the Leader?”, managing partners continue the conversation over lunch at roundtables to discuss their own experiences and insights on the topics just discussed. Each table shares two perspectives: what leaders do themselves to manage the isolation, stress, and decision fatigue of the top job, from personal routines and boundaries to the people they turn to for advice; and what they do within their organizations, such as sharing leadership responsibilities, building support structures, and creating a culture of well-being for partners and teams.

12:45 PM–1:15 PM | Show Me the Value: How Clients Judge Outside Counsel and Measure the Return on AI

Firms cannot change how they work without evidence that it delivers value. This panel brings together a senior in-house counsel and managing partners from firms of different sizes to explore how clients judge the value of outside counsel, how firms measure the return on their investments in AI, and what proof clients want to see: outcomes, speed, risk reduction, and insight across their portfolios. Speakers share practical examples of reporting value, building client trust, and turning efficiency gains into stronger relationships, giving participants ideas they can apply in their own firms and with their own clients right away.

Moderator: Jennifer A. Van Kirk, Partner, Womble Bond Dickinson (USA)

Speakers:

- Tanya Fickenscher, Vice President and Deputy General Counsel, Major League Baseball (USA)
- Auma Reggy, Managing Chief Counsel, Intellectual Property, McKesson Corporation (USA)

1:20 PM–1:50 PM | Roundtable: Show Me the Value – How Is Your Firm Proving It to Clients?

Following the panel “Show Me the Value,” the conversation moves from the stage to the room. Managing partners, not the panelists, now lead the discussion at roundtables with leaders of firms of a similar size, sharing their own experiences and insights on the topics just discussed: how their

clients judge the value of outside counsel, what proof clients are asking them for, and how they are measuring the return on their investments in AI. Building on the examples the panelists shared, each table of managing partners agrees on practical ways a firm like theirs could show clients evidence of value within the next six months, and shares one key takeaway with the room. To close the program, participants write three personal commitments for the next three years: one for their business, one for their people, and one for themselves; they also share the topics they would like to explore at next year's forum.

1:50 PM–2:00 PM | Closing Remarks

- Jennifer A. Van Kirk, Partner, Womble Bond Dickinson (USA), Co-Chair, Managing Partners Retreat
- Sheja Ehtesham, Managing Partner, ALG India Law Offices LLP (India), Co-Chair, Managing Partners Retreat

3:45 PM–4:45 PM | Closing Cocktails

Retreat participants are warmly invited to the 2026 Leadership Meeting Closing Cocktails to continue the conversation with fellow firm leaders and the wider INTA community.