

# TECHNOLOGY & IP DUE DILIGENCE CHECKLIST

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This checklist contains documents and information related to technology and intellectual property that a seller might request from a buyer.

TECH & IP	OWNER	COMPLETE?	DATE OF COMPLETION	NOTES
IT costs				
IT upgrades needed				
Documentation of disaster recovery plans				
Domain names owned or used				
Patents held (both foreign and domestic)				
Trademarks and service marks held				
Copyrighted material used or owned				
IP protection processes, including standard agreements with employees, ex-employees, and consultants				
Any exceptions to standard IP protection agreements				
Trade secrets and steps to protect them				
Current IP litigation				
Trademark disputes that are in process				
Which software titles are critical to standard ops, and licenses for that software				
How open source software is used				
Odd or unusual escrow arrangements				
Research and development budget and plans				
Pending patent applications				

Pending patents clearance documents				
Identities provided to or obtained from third parties for IP				
Liens on IP				
Exclusive tech licenses that have been issued to third parties				

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