

SOFTWARE IP BUDGET & EXPENSE TEMPLATE

SOFTWARE PATENT PORTFOLIO TRACKER

PROJECT / SOFTWARE NAME:

FISCAL YEAR:

IP OWNER / DEPARTMENT:

LEAD PATENT ATTORNEY/FIRM:

DATE CREATED / UPDATED:

CURRENCY:

TOTAL BUDGET ALLOCATED
TOTAL ACTUAL EXPENSES
REMAINING BALANCE
TOTAL VARIANCE

PHASE 1: EVALUATION & PRE-FILING

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	INVOICE DATE	REFERENCE #	NOTES / STATUS
Prior Art & Patentability Search						
Freedom to Operate (FTO) Analysis						
Technical Disclosure Meetings / Review						
PHASE 1 SUBTOTAL						

PHASE 2: DRAFTING & FILING

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	INVOICE DATE	REFERENCE #	NOTES / STATUS
Provisional Application Drafting (Attorney Fees)						
Provisional Application USPTO Filing Fees						

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	INVOICE DATE	REFERENCE #	NOTES / STATUS
Non-Provisional Utility Patent Drafting						
Utility Patent Filing Fees (USPTO/Other Authority)						
Illustration & Technical Drawings (UI/Flowcharts)						
PHASE 2 SUBTOTAL						

PHASE 3: PROSECUTION & EXAMINATION

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	INVOICE DATE	REFERENCE #	NOTES / STATUS
Office Action Responses (Attorney Fees)						
USPTO Extension / Response Government Fees						
Examiner Interview Preparation & Fees						
Post-Allowance & Issue Fees						
PHASE 3 SUBTOTAL						

PHASE 4: INTERNATIONAL FILINGS & MAINTENANCE

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	INVOICE DATE	REFERENCE #	NOTES / STATUS
PCT International Application Filing						
National Stage Entry Fees (per country/region)						
Translation Fees (Non-English jurisdictions)						
Annuities & Maintenance Fees (Years 3-4 / 7-8)						
PHASE 4 SUBTOTAL						

SUMMARY OF ALL PHASES

GRAND SUMMARY	TOTAL ESTIMATED	TOTAL ACTUAL	TOTAL VARIANCE	
GRAND TOTAL				