

SOFTWARE PATENT PORTFOLIO BUDGET TEMPLATE

Expense Tracking & Financial Forecast

PORTFOLIO / PROJECT NAME

LEAD PATENT COUNSEL

FISCAL YEAR / PERIOD

DATE LAST UPDATED

TOTAL BUDGET ALLOCATED

TOTAL ACTUAL SPEND

REMAINING BALANCE / VARIANCE

1. Evaluation & Pre-Filing Phase

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
Invention Disclosure Review & Assessment				
Prior Art Search & Patentability Opinion				
Technical Consultation (Software Architects / Developers)				
Subtotal - Pre-Filing				

2. Drafting & Filing Phase

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
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EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
Application Drafting (Specification, Claims, Flowcharts)				
Formal Drawings / Illustrating Software Architecture				
USPTO / Patent Office Filing Fees (Search, Examination, Utility)				
Legal Counsel Representation / Filing Attorney Fees				
Subtotal - Drafting & Filing				

3. Patent Prosecution Phase

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
Office Action Response - First (Legal Fees)				
Office Action Response - Subsequent (Legal Fees)				
USPTO Extension of Time Fees (if applicable)				
Examiner Interview (Preparation & Attendance)				
Request for Continued Examination (RCE) / Appeal Fees				
Subtotal - Prosecution				

4. Allowance, Issuance & Maintenance

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
Patent Issue / Publication Fees				
Maintenance Fees - 3.5 Years				
Maintenance Fees - 7.5 Years				
Maintenance Fees - 11.5 Years				
Subtotal - Maintenance				

5. International Filings & PCT (If Applicable)

EXPENSE ITEM	ESTIMATED COST	ACTUAL COST	VARIANCE	DATE PAID
PCT Application Filing Fees				
International Search Authority (ISA) Fees				
National Stage Entry Fees (per country/region)				
Translation & Local Agent Fees				
Subtotal - International				

Summary Totals

GRAND TOTALS	PROJECTED BUDGET	ACTUAL SPEND	VARIANCE
Total Portfolio Expenditure			