

Debora Joanne Rose, CPA, MBA

Debora Joanne Rose
Managing Director

InvotexIP, LLC
850 S Bond Street
Baltimore, Maryland 21231
Tel: (443) 821-0191

drose@InvotexIP.com

Education and Professional

- Case Western Reserve University, MBA, 1990
- Kent State University, BA, 1986
- Certified Public Accountant (CPA)

Employment

- InvotexIP, LLC
- Invotex, Inc.
- Navigant Consulting, Inc.
- PENTA Advisory Services, LLC
- C.W. Amos & Company, LLC
- Coopers & Lybrand (PWC)
- Ameritrust Bank, N.A.

Professional Associations

- American Institute of Certified Public Accountants
- Association of University Technology Managers
- Maryland Association of Certified Public Accountants

Current Position

Ms. Rose is a managing director and founder of InvotexIP, LLC (“Invotex”). Invotex assists intellectual property owners with a full range of financial IP advisory services, including royalty audits and license compliance.

Professional Experience

Ms. Rose leads Invotex’s License Management and Royalty Audit and Compliance practice. She has more than 25 years experience working with corporations, universities and their counsel on intellectual property matters. She has worked with clients in a wide range of industries, from computer graphics, pharmaceuticals and biotechnology to consumer goods. Ms. Rose’s intellectual property experience includes intellectual property compliance, valuation and licensing consulting as well as reasonable royalty and lost profit damage calculations in patent, trademark and copyright infringement and trade secret matters. Further, she developed a proprietary Royalty Reporting Process to help clients take a proactive approach to managing royalty reporting and revenue. She has authored several articles and has given presentations and expert testimony on related topics.

In addition, Ms. Rose has provided advisory services to clients in all phases of the litigation process. Her assignments have included breach of contract, business interruption, unfair competition, intellectual property matters and investigative accounting engagements. She has additionally directed numerous engagements requiring forensic accounting and financial investigation experience.

Ms. Rose is a Certified Public Accountant with an MBA in finance and marketing from Case Western Reserve University and a BBA in industrial management from Kent State University. Her work experience includes positions in Commercial Banking, Coopers & Lybrand (PricewaterhouseCoopers) and Navigant Consulting.

She is a member of the American Institute of Certified Public Accountants (AICPA), Association of University Technology Managers (AUTM) where she is the co-chair of the Valuation Committee, and Maryland Association of Certified Public Accountants (MACPA).

Testimony and Affidavits

In addition to multiple dispute assignments where testimony was not provided, Ms. Rose has testified or submitted expert testimony primarily relating to accounting, damages, valuation, economics and financial issues in the following matters for the past five (5) years:

- Deposition Testimony and Expert Report in SIPCO, LLC v Mueller Systems, LLC, Civil Action File No. 22-A-08940-7, Superior Court of Gwinnett County, State of Georgia (testimony given and report issued in 2023).
- Deposition Testimony and Expert Report in JFY Properties II LLC v. Gunther Land, LLC, et. al., Case No.: 1:17-cv-1653-ELH, U.S. District Court, District of Maryland, Northern Division (testimony given and report issued in 2020).

Papers, Publications and Presentations for the past ten (10) years

- Co-author: "Is My Licensee in Compliance? Tips to Keep Them on Track," February 2023
- Co-presenter: "License Agreement Financial Terms: The Good, the Bad and the WT* Were We Thinking?!" SPLiCE Brand Oasis Licensors Summit, January 2023
- Co-presenter: "Royalty Audits: It's Not Only About the Money, Is the Licensee really operating in the way you think they are?" SPLiCE International Meeting, October 2022
- Co-author: "The Magnitude and Meaning of Royalty Misreporting (New)," *Intellectual Property – Valuation, Exploitation, and Infringement Damages* – 2018, Chapter 19
- Co-presenter: AUTM Technology Valuation Course, AUTM Annual Meeting, 2018
- Co-presenter: "It's All About Your Money: How to Get What You Negotiated," AUTM Annual Meeting, 2018
- Presenter: "Best Practices in License Agreement Compliance," Webinar, November 2016

- Presenter: "License Agreement Compliance," AUTM TOOLS Course, October 2016
- Co-author: "Who Is Keeping An Eye On Your Royalty Income?" June 2015
- Co-author: "Trust, but verify: are you collecting your fair share of royalties?" *Intellectual Asset Management Magazine*, January/February 2014
- Co-presenter: "Royalties and Relationships – Keeping Current, Complete and Congenial," Webinar, December 2013
- Co-author: "Licence¹ check," *Intellectual Property Magazine*, November 2013
- Co-author: "89% of Audited IP Licensees Underpay Royalties," *Corporate Counsel*, September 2013
- Co-author: "13th Annual InvoTex Royalty Compliance Report," August 2013

¹ *Intellectual Property Magazine* is a UK publication, License is spelled "Licence" for this article.