

Insurance & Financial Services

Preserving and Protecting the Flow of Capital

In the insurance and financial services industries, competition is fierce and an incremental edge can yield profound results. At Marshall, Gerstein & Borun LLP, our attorneys and professionals help clients gain key advantages through effective intellectual property protection and manage risks arising from the IP of competitors and other entities. Our superior track record in finance-related sectors and ahead-of-the-pack perspective on industry trends enables insurance companies, banks, investors, and other industry participants to make the most of their patents, trademarks, and similar IP assets.

Achieving results in a changing landscape

As courts have continued to restrict the types of inventions that are eligible for patent protection, patent procurement has become increasingly difficult for insurance and financial services companies. To meet that challenge, we work with clients to identify the aspects, features, and implementation details of their products and services to include aspects having the greatest eligibility for patent protection and potential for positive returns. Where patent protection hurdles are particularly high, we identify and implement additional forms of protection, including copyrights, trade secrets, and trademarks, that can secure their IP for the near and long term. And when IP-related disputes arise, our highly respected litigators are prepared to pursue resolution in federal and state courts at every level, as well as in arbitration or negotiated settlements.

Multidisciplinary solutions to complex challenges

Our attorneys and professionals work diligently to stay on top of the most recent case law and are passionate about the technologies and best practices used within the industry. We regularly attend conferences, deliver presentations exploring emerging technology-related IP issues, and support ongoing exchanges of information and knowledge with each other and our clients. Taken together, our legal scholarship and real-world business acumen help clients scan the legal horizon, establish clear IP policies, develop and implement creative dispute-avoidance strategies, and identify and enforce strategic IP rights that can provide the highest return on investment.

Our Firm has firsthand experience across the insurance and financial service industries, including specific sectors such as property and casualty insurance, life insurance, electronic trading services, financial instruments, and investment fund management. Among recent examples, we have helped clients secure patent rights relating to numerous products and services as well as internal processes, internal/employee-facing tools, and external/customer-facing tools. This enables us to take a deep, multi-faceted approach to our clients' business challenges and opportunities.

We counsel clients on the full scope of IP issues arising in the context of insurance and financial products, services, and systems. Areas of focus include:

- Autonomous vehicles
- Big data
- Blockchain technology
- Cloud-based computing
- Customer-service technologies
- Database management
- Information security technologies
- Internet of Things (IoT)

- Machine learning/intelligence
- Mobile communications and technology
- Predictive modeling
- Telematics
- Trading platforms

Representative Clients

- AON Inc.
- Affinity Insurance Services, Inc.
- Citadel
- Mercury Insurance Services
- Mutual of Omaha
- Professional Liability Insurance