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## Trade Secrets

We help clients identify and safeguard trade secrets across every stage of the business lifecycle, from product development and vendor collaboration to corporate transitions and litigation.

### Safeguarding What Makes Your Business Unique

Shartsis Friese advises companies, investors and executives on protecting and enforcing their most sensitive business information — formulas, algorithms, processes, customer data, source code and proprietary know-how.

### Developing and Protecting Trade Secret Programs

We counsel clients on how to identify, classify and secure trade secrets through practical, scalable programs. Our attorneys design and implement comprehensive trade secret protection programs that align with each client's operations, industry and risk profile. We develop confidentiality and nondisclosure agreements, employee and contractor policies, access controls, and data-management frameworks to ensure compliance with the Defend Trade Secrets Act (DTSA) and state law. We also perform audits and due diligence to evaluate the adequacy of existing protection measures and advise on practical enhancements to reduce exposure.

### Strategic Counseling and Risk Management

Our team advises clients on the full lifecycle of trade secret management, from initial creation to commercial use and enforcement. We help businesses establish protocols for secure information sharing, implement nondisclosure agreements and manage relationships with

#### RELATED ATTORNEYS

[Lydia Davenport, Associate](#)

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employees, suppliers and partners. We perform targeted due diligence to assess the adequacy of protection measures and mitigate exposure.

## Dispute Resolution and Enforcement

When confidential information is misappropriated, we move quickly to protect our clients' interests. Shartsis Friese represents both plaintiffs and defendants in trade secret litigation in federal and state courts, as well as in arbitration. We use the full range of available remedies (including injunctions, damages recovery and forensic investigation) to stop misuse and prevent further harm. Our experience includes cases arising under the DTSA, California Uniform Trade Secrets Act (CUTSA) and related contractual claims.

## Representative Matters

- Developed and implemented a comprehensive trade secret protection plan for a technology company, including identification and classification of proprietary information, adoption of confidentiality and access-control protocols, employee and contractor training, and integration of contractual and cybersecurity safeguards to preserve trade secret status and support future enforcement.
- Conducted a trade secret audit for a hedge fund and financial services company to identify and catalog proprietary investment models, algorithms and client data, and evaluated existing confidentiality, employment and vendor agreements, and recommended enhanced protective measures.
- Assisted a manufacturer of consumer products in developing and implementing policies, procedures and contractual safeguards to protect trade secrets and other confidential business information.
- Assisted with the onboarding of employees hired from competitors to minimize the risk of trade secret misappropriation and implemented protocols to prevent the transfer or use of confidential information of prior employers.