

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

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APPLICATION FOR TRADEMARK REGISTRATION  
UNDER SECTION 1(a)

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Mark: PLANMEMBER CLIENTCONNECT

International Class No.: 036

To the Commissioner of Patents and Trademarks:

Applicant is PlanMember Financial Corporation, a California Corporation with a business address of 6187 Carpinteria Avenue, Carpinteria, CALIFORNIA UNITED STATES 93013.

The above-identified applicant has adopted and is using the mark shown in the accompanying drawing for “*online platform for managing client retirement accounts, managing client investments and insurance policies, accessing educational services in the nature of training videos for serving clients; online financial retirement planning services; and online financial and investment consulting, management, and brokerage services; financial retirement planning services; financial services; computer application for managing client retirement accounts, finances and insurance policies*” in International Class 036.

The above-identified applicant requests that said mark be registered in the United States Patent and Trademark Office in the Principal Register established by the Act of July 5, 1946.

20-42466

The above referenced mark was first used in connection with the services in International Class 036 at least as early as January 1, 2020; and was first used in interstate commerce at least as early as January 1, 2020; and is now in use in such commerce.

The mark is used by imprinting the same on advertisements, brochures, webpages, or the like, which are distributed and/or displayed to customers for purposes of identifying applicant's services. One (1) specimen illustrating the mark is included herewith.

Applicant's mark is a word mark presented in standard character format with no design element and without claim to any particular font, style, size or color.

**DECLARATION**

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The undersigned, on behalf of Applicant, being hereby warned that willful false statements and the like so made are punishable by fine or imprisonment, or both, under 18 U.S.C. § 1001, and that such willful false statements may jeopardize the validity of the application or any resulting registration, declares that he/she is properly authorized to execute this application on behalf of the Applicant; he/she believes the Applicant is the owner of the service mark sought to be registered, or, if the application is being filed under 15 U.S.C. § 1051(b), he/she believes Applicant to be entitled to use such mark in commerce; and to the best of his/her knowledge and belief no other person, firm, corporation or association has the right to use the mark in commerce, either in the identical form thereof, or in such near resemblance thereto as to be likely, when used on or in connection with the services of such other person, to cause confusion, or to cause mistake, or to deceive; and that all statements made of his/her own knowledge are true and all statements made on information and belief are believed to be true.

PlanMember Financial Corporation

Date: 8/12, 2020

\_\_\_\_\_  
Signature

Jon Zisch  
Name

President/CEO  
Officer Title

**POWER OF ATTORNEY**

Applicant hereby appoints the attorneys listed below to prosecute this application to register, to transact all business in the United States Patent and Trademark Office in connection therewith, and to receive the Certificate of Registration. The attorneys listed are all members of the Bar of the State of California in good standing and are admitted to practice in the State of California and the United States Patent and Trademark Office.

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PlanMember Financial Corporation

Date: 8/12, 2020

Signature

Name

Officer Title

*Jon Ziegler*

*President/CEO*

Matter No.

## **DRAWING PAGE**

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**APPLICANT:** PlanMember Financial Corporation

**ADDRESS:** 6187 Carpinteria Avenue  
Carpinteria, CALIFORNIA UNITED STATES 93013

The mark consists of standard characters without claim to any particular font style, size, or color.

<b>CLASS</b>	<b>DATE OF FIRST USE at least as early as</b>	<b>FIRST USE IN INTERSTATE COMMERCE at least as early as</b>	<b>SERVICES</b>
036	January 1, 2020	January 1, 2020	online platform for managing client retirement accounts, managing client investments and insurance policies, accessing educational services in the nature of training videos for serving clients; online financial retirement planning services; and online financial and investment consulting, management, and brokerage services; financial retirement planning services; financial services; computer application for managing client retirement accounts, finances and insurance policies

**MARK:** PLANMEMBER CLIENTCONNECT

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