

Generated on: This page was generated by TSDR on 2019-08-16 10:24:09 EDT

Mark: 1-CLICK REVIEW

1-CLICK REVIEW

US Serial Number: 85255460

Application Filing Date: Mar. 02, 2011

US Registration Number: 4365132

Registration Date: Jul. 09, 2013

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Jul. 09, 2013

Publication Date: Feb. 14, 2012

Notice of Allowance Date: Oct. 23, 2012

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## Mark Information

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Mark Literal Elements: 1-CLICK REVIEW

Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

Mark Drawing Type: 4 - STANDARD CHARACTER MARK

Disclaimer: "REVIEW"

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis (...) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

**For:** Providing an investment advisory database to financial advisors for the purpose of review and generation of consolidated, household financial reports in the field of stocks, securities and financial planning, none of the foregoing being related to consumer payments

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Sep. 17, 2010

Use in Commerce: Sep. 17, 2010

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## Basis Information (Case Level)

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Filed Use: No

Currently Use: Yes

Amended Use: No

Filed ITU: Yes

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

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## Current Owner(s) Information

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Owner Name: Commonwealth Equity Services, LLP

Owner Address: One University Office Park, 29 Sawyer Rd  
Waltham, MASSACHUSETTS 02453  
UNITED STATES

Legal Entity Type: limited liability partnership

State or Country MASSACHUSETTS  
Where Organized:

## Attorney/Correspondence Information

### Attorney of Record

Attorney Name: Louis J. Franco

Docket Number: 2010-1003

### Correspondent

Correspondent Name/Address: LOUIS J. FRANCO  
LAW OFFICE OF LOUIS J. FRANCO  
250 ARBOR ST  
LUNENBURG, MASSACHUSETTS 01462-1458  
UNITED STATES

Phone: (978) 582-5550

Fax: (978) 582-9022

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Jul. 09, 2013	REGISTERED-PRINCIPAL REGISTER	
Jun. 06, 2013	NOTICE OF ACCEPTANCE OF STATEMENT OF USE MAILED	
Jun. 05, 2013	LAW OFFICE REGISTRATION REVIEW COMPLETED	73787
May 22, 2013	ALLOWED PRINCIPAL REGISTER - SOU ACCEPTED	
May 13, 2013	STATEMENT OF USE PROCESSING COMPLETE	65362
Apr. 23, 2013	USE AMENDMENT FILED	65362
May 10, 2013	CASE ASSIGNED TO INTENT TO USE PARALEGAL	65362
Apr. 23, 2013	TEAS STATEMENT OF USE RECEIVED	
Oct. 23, 2012	NOA MAILED - SOU REQUIRED FROM APPLICANT	
Aug. 28, 2012	EXTENSION OF TIME TO OPPOSE PROCESS - TERMINATED	
Aug. 01, 2012	CHANGES/CORRECTIONS AFTER PUB APPROVAL ENTERED	67832
Jul. 27, 2012	ASSIGNED TO PETITION STAFF	67832
Jul. 25, 2012	TEAS POST PUBLICATION AMENDMENT RECEIVED	1111
May 07, 2012	ASSIGNED TO EXAMINER	88222
Mar. 13, 2012	EXTENSION OF TIME TO OPPOSE RECEIVED	
Feb. 14, 2012	PUBLISHED FOR OPPOSITION	
Jan. 25, 2012	NOTICE OF PUBLICATION	
Jan. 12, 2012	LAW OFFICE PUBLICATION REVIEW COMPLETED	73787
Jan. 11, 2012	APPROVED FOR PUB - PRINCIPAL REGISTER	
Jan. 05, 2012	EXAMINERS AMENDMENT MAILED	
Jan. 04, 2012	EXAMINER'S AMENDMENT ENTERED	73787
Jan. 04, 2012	EXAMINERS AMENDMENT -WRITTEN	78196
Dec. 14, 2011	TEAS/EMAIL CORRESPONDENCE ENTERED	73787
Dec. 14, 2011	CORRESPONDENCE RECEIVED IN LAW OFFICE	73787
Dec. 08, 2011	ASSIGNED TO LIE	73787
Nov. 28, 2011	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
May 31, 2011	NON-FINAL ACTION MAILED	
May 28, 2011	NON-FINAL ACTION WRITTEN	78196
May 20, 2011	ASSIGNED TO EXAMINER	78196
Mar. 08, 2011	NOTICE OF PSEUDO MARK MAILED	
Mar. 07, 2011	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	

## TM Staff and Location Information

### TM Staff Information - None

### File Location

Current Location: PUBLICATION AND ISSUE SECTION

Date in Location: Jun. 05, 2013

## Proceedings

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**Summary**

Number of 1  
Proceedings:

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**Type of Proceeding: Extension of Time**

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**Proceeding Number:** [85255460](#)

**Filing Date:** Mar 13, 2012

**Status:** Terminated

**Status Date:** Aug 28, 2012

**Interlocutory Attorney:**

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**Defendant**

**Name:** Commonwealth Equity Services, LLP

**Correspondent Address:** LOUIS J. FRANCO  
LAW OFFICE OF LOUIS J. FRANCO  
250 ARBOR ST  
LUNENBURG MA , 01462-1458  
UNITED STATES

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**Associated marks**

Mark	Application Status	Serial Number	Registration Number
1-CLICK REVIEW	Registered	<a href="#">85255460</a>	<a href="#">4365132</a>

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**Potential Opposer(s)**

**Name:** Amazon Technologies, Inc.

**Correspondent Address:** Purvi J. Patel  
Haynes and Boone, LLP  
2323 Victory Ave.Suite 700  
Dallas TX , 75219  
UNITED STATES

**Correspondent e-mail:** [patelp@haynesboone.com](mailto:patelp@haynesboone.com) , [ipdocketing@haynesboone.com](mailto:ipdocketing@haynesboone.com)

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**Prosecution History**

Entry Number	History Text	Date	Due Date
1	INCOMING - EXT TIME TO OPPOSE FILED	Mar 13, 2012	
2	EXTENSION OF TIME GRANTED	Mar 13, 2012	
3	INCOMING - EXT TIME TO OPPOSE FILED	Jun 12, 2012	
4	EXTENSION OF TIME GRANTED	Jun 12, 2012	

Generated on: This page was generated by TSDR on 2019-08-16 10:25:10 EDT

Mark: ANNUITY REVIEW



US Serial Number: 85844075

Application Filing Date: Feb. 07, 2013

US Registration Number: 4489521

Registration Date: Feb. 25, 2014

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Feb. 25, 2014

Publication Date: Jul. 23, 2013

Notice of Allowance Date: Sep. 17, 2013

## Mark Information

Mark Literal Elements: ANNUITY REVIEW

Standard Character Claim: No

Mark Drawing Type: 3 - AN ILLUSTRATION DRAWING WHICH INCLUDES WORD(S)/ LETTER(S)/NUMBER(S)

Description of Mark: The mark consists of the words "ANNUITY REVIEW" with a magnifying glass over "ANNUITY".

Color(s) Claimed: Color is not claimed as a feature of the mark.

Disclaimer: "ANNUITY REVIEW"

Design Search Code(s): 16.03.06 - Glasses, magnifying; Magnifying glasses; Loupes, jeweler's (magnifiers); Jeweler's loupes (magnifiers)

## Goods and Services

### Note:

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*.\* identify additional (new) wording in the goods/services.

For: Consulting services in the field of financial advising specifically pertaining to annuity contracts

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Jan. 02, 2013

Use in Commerce: Jan. 02, 2013

## Basis Information (Case Level)

Filed Use: No

Currently Use: Yes

Amended Use: No

Filed ITU: Yes

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

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## Current Owner(s) Information

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**Owner Name:** Cortazzo, Mark

**Owner Address:** Macro Consulting Group  
1639 Route 10 East  
Parsippany, NEW JERSEY 07054  
UNITED STATES

**Legal Entity Type:** INDIVIDUAL

**Citizenship:** UNITED STATES

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## Attorney/Correspondence Information

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**Attorney of Record - None**

**Correspondent**

**Correspondent Name/Address:** CORTAZZO, MARK  
1639 ROUTE 10  
PARSIPPANY, NEW JERSEY 07054-4506  
UNITED STATES

**Phone:** 973-451-9400

**Fax:** 973-451-9401

**Domestic Representative - Not Found**

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## Prosecution History

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Date	Description	Proceeding Number
Feb. 25, 2019	COURTESY REMINDER - SEC. 8 (6-YR) E-MAILED	
Feb. 25, 2014	REGISTERED-PRINCIPAL REGISTER	
Jan. 23, 2014	NOTICE OF ACCEPTANCE OF STATEMENT OF USE E-MAILED	
Jan. 22, 2014	LAW OFFICE REGISTRATION REVIEW COMPLETED	73797
Jan. 22, 2014	ALLOWED PRINCIPAL REGISTER - SOU ACCEPTED	
Jan. 17, 2014	STATEMENT OF USE PROCESSING COMPLETE	69302
Dec. 04, 2013	USE AMENDMENT FILED	69302
Jan. 15, 2014	CASE ASSIGNED TO INTENT TO USE PARALEGAL	69302
Dec. 04, 2013	TEAS STATEMENT OF USE RECEIVED	
Sep. 17, 2013	NOA E-MAILED - SOU REQUIRED FROM APPLICANT	
Jul. 23, 2013	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Jul. 23, 2013	PUBLISHED FOR OPPOSITION	
Jul. 03, 2013	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Jun. 14, 2013	LAW OFFICE PUBLICATION REVIEW COMPLETED	73797
Jun. 14, 2013	ASSIGNED TO LIE	73797
May 29, 2013	APPROVED FOR PUB - PRINCIPAL REGISTER	
May 29, 2013	EXAMINER'S AMENDMENT ENTERED	88888
May 29, 2013	NOTIFICATION OF EXAMINERS AMENDMENT E-MAILED	6328
May 29, 2013	EXAMINERS AMENDMENT E-MAILED	6328
May 29, 2013	EXAMINERS AMENDMENT -WRITTEN	83216
May 28, 2013	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
May 28, 2013	NON-FINAL ACTION E-MAILED	6325
May 28, 2013	NON-FINAL ACTION WRITTEN	83216
May 21, 2013	ASSIGNED TO EXAMINER	83216
Feb. 14, 2013	NOTICE OF DESIGN SEARCH CODE E-MAILED	
Feb. 13, 2013	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	

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## TM Staff and Location Information

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**TM Staff Information - None**

**File Location**

**Current Location:** PUBLICATION AND ISSUE SECTION

**Date in Location:** Jan. 22, 2014

Generated on: This page was generated by TSDR on 2019-08-16 10:25:37 EDT

Mark: BENEFITSREVIEW

BENEFITSREVIEW

US Serial Number: 85554078

Application Filing Date: Feb. 27, 2012

US Registration Number: 4323022

Registration Date: Apr. 23, 2013

Register: Principal

Mark Type: Service Mark

Status: A Sections 8 and 15 combined declaration has been accepted and acknowledged.

Status Date: Jun. 03, 2019

Publication Date: Feb. 05, 2013

## Mark Information

Mark Literal Elements: BENEFITSREVIEW

Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

Mark Drawing Type: 4 - STANDARD CHARACTER MARK

Acquired Distinctiveness Claim: In whole

## Related Properties Information

Claimed Ownership of US Registrations: 2462981

## Goods and Services

### Note:

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis (..) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Administration of employee benefits plans concerning insurance; Providing information in the field of employee benefits plans concerning insurance

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: 1998

Use in Commerce: 1998

## Basis Information (Case Level)

Filed Use: Yes

Currently Use: Yes

Amended Use: No

Filed ITU: No

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

## Current Owner(s) Information

**Owner Name:** Brown & Brown Insurance Services of California, Inc.

**Owner Address:** Attn: Legal Department  
220 S. Ridgewood Avenue  
Daytona Beach, FLORIDA 32114  
UNITED STATES

**Legal Entity Type:** CORPORATION

**State or Country** CALIFORNIA  
**Where Organized:**

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** Michael D. Fishman

**Attorney Primary** [ccastello@bbins.com](mailto:ccastello@bbins.com)  
**Email Address:**

**Attorney Email** Yes  
**Authorized:**

### Correspondent

**Correspondent** Brown & Brown Insurance Services of California, In  
**Name/Address:** 220 S. Ridgewood Avenue  
Attn: Legal Department  
Daytona Beach, FLORIDA 32114  
UNITED STATES

**Phone:** 3862398827

**Correspondent e-** [ccastello@bbins.com](mailto:ccastello@bbins.com)  
**mail:**

**Correspondent e-** Yes  
**mail Authorized:**

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Jun. 04, 2019	NOTICE OF ACCEPTANCE OF SEC. 8 & 15 - E-MAILED	
Jun. 03, 2019	REGISTERED - SEC. 8 (6-YR) ACCEPTED & SEC. 15 ACK.	69471
May 31, 2019	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	69471
Apr. 17, 2019	TEAS CHANGE OF CORRESPONDENCE RECEIVED	
Apr. 17, 2019	TEAS SECTION 8 & 15 RECEIVED	
Apr. 23, 2018	COURTESY REMINDER - SEC. 8 (6-YR) E-MAILED	
Apr. 23, 2013	REGISTERED-PRINCIPAL REGISTER	
Feb. 05, 2013	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Feb. 05, 2013	PUBLISHED FOR OPPOSITION	
Jan. 16, 2013	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Dec. 29, 2012	LAW OFFICE PUBLICATION REVIEW COMPLETED	74221
Dec. 29, 2012	ASSIGNED TO LIE	74221
Dec. 13, 2012	APPROVED FOR PUB - PRINCIPAL REGISTER	
Dec. 11, 2012	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
Dec. 11, 2012	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
Dec. 11, 2012	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Jun. 15, 2012	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Jun. 15, 2012	NON-FINAL ACTION E-MAILED	6325
Jun. 15, 2012	NON-FINAL ACTION WRITTEN	81141
Jun. 06, 2012	ASSIGNED TO EXAMINER	81141
Mar. 07, 2012	NOTICE OF PSEUDO MARK MAILED	
Mar. 06, 2012	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Mar. 01, 2012	NEW APPLICATION ENTERED IN TRAM	

## Maintenance Filings or Post Registration Information

**Affidavit of** Section 8 - Accepted  
**Continued Use:**

**Affidavit of** Section 15 - Accepted  
**Incontestability:**

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## TM Staff and Location Information

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TM Staff Information - None  
File Location

Current Location: TMO LAW OFFICE 112

Date in Location: Jun. 03, 2019



Generated on: This page was generated by TSDR on 2019-08-16 10:26:13 EDT

Mark: COVENANT REVIEW

COVENANT REVIEW

US Serial Number: 77290310      Application Filing Date: Sep. 27, 2007  
US Registration Number: 3459866      Registration Date: Jul. 01, 2008  
Register: Supplemental  
Mark Type: Service Mark  
Amended to Principal Register: No      Date Amended to Current Register: May 08, 2008  
Status: The registration has been renewed.  
Status Date: Apr. 13, 2018

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## Mark Information

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Mark Literal Elements: COVENANT REVIEW  
Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.  
Mark Drawing Type: 4 - STANDARD CHARACTER MARK  
Disclaimer: "REVIEW"

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## Related Properties Information

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Claimed Ownership of US Registrations: 3300330

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis (..) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks "\*" identify additional (new) wording in the goods/services.

**For:** providing financial information to investors in the form of reviews and research reports

**International Class(es):** 036 - Primary Class

**U.S Class(es):** 100, 101, 102

**Class Status:** ACTIVE

**Basis:** 1(a)

**First Use:** Feb. 09, 2006

**Use in Commerce:** Feb. 09, 2006

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## Basis Information (Case Level)

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<b>Filed Use:</b> Yes	<b>Currently Use:</b> Yes	<b>Amended Use:</b> No
<b>Filed ITU:</b> No	<b>Currently ITU:</b> No	<b>Amended ITU:</b> No
<b>Filed 44D:</b> No	<b>Currently 44D:</b> No	<b>Amended 44D:</b> No
<b>Filed 44E:</b> No	<b>Currently 44E:</b> No	<b>Amended 44E:</b> No
<b>Filed 66A:</b> No	<b>Currently 66A:</b> No	
<b>Filed No Basis:</b> No	<b>Currently No Basis:</b> No	

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## Current Owner(s) Information

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**Owner Name:** Covenant Review, LLC

**Owner Address:** 6th Floor  
708 Third Avenue  
New York, NEW YORK 10017  
UNITED STATES

**Legal Entity Type:** LIMITED LIABILITY COMPANY

**State or Country** NEW YORK  
**Where Organized:**

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** Kourtney Mulcahy

**Docket Number:** 879398

**Attorney Primary** [trademarks@hinshawlaw.com](mailto:trademarks@hinshawlaw.com)  
**Email Address:**

**Attorney Email** Yes  
**Authorized:**

### Correspondent

**Correspondent** Kourtney Mulcahy  
**Name/Address:** HINSHAW & CULBERTSON LLP  
222 N LASALLE ST STE 300  
CHICAGO, ILLINOIS 60601-1081  
UNITED STATES

**Phone:** 312-704-3336

**Fax:** 312-704-3001

**Correspondent e-mail:** [trademarks@hinshawlaw.com](mailto:trademarks@hinshawlaw.com) [kmulcahy@hinshawlaw.com](mailto:kmulcahy@hinshawlaw.com)  
[wlaw.com](mailto:wlaw.com)

**Correspondent e-mail** Yes  
**Authorized:**

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Apr. 13, 2018	NOTICE OF ACCEPTANCE OF SEC. 8 & 9 - E-MAILED	
Apr. 13, 2018	REGISTERED AND RENEWED (FIRST RENEWAL - 10 YRS)	73376
Apr. 13, 2018	REGISTERED - SEC. 8 (10-YR) ACCEPTED/SEC. 9 GRANTED	73376
Apr. 07, 2018	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	73376
Mar. 26, 2018	TEAS SECTION 8 & 9 RECEIVED	
Mar. 26, 2018	TEAS CHANGE OF CORRESPONDENCE RECEIVED	
Jul. 01, 2017	COURTESY REMINDER - SEC. 8 (10-YR)/SEC. 9 E-MAILED	
May 13, 2015	ASSIGNMENT OF OWNERSHIP NOT UPDATED AUTOMATICALLY	
Sep. 14, 2013	NOTICE OF ACCEPTANCE OF SEC. 8 - E-MAILED	
Sep. 14, 2013	REGISTERED - SEC. 8 (6-YR) ACCEPTED	71378
Sep. 10, 2013	REGISTERED - SEC. 8 (6-YR) FILED	71378
Sep. 14, 2013	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	71378
Sep. 10, 2013	TEAS SECTION 8 RECEIVED	
Jul. 01, 2008	REGISTERED-SUPPLEMENTAL REGISTER	
May 23, 2008	LAW OFFICE PUBLICATION REVIEW COMPLETED	76243
May 23, 2008	ASSIGNED TO LIE	76243
May 23, 2008	APPROVED FOR REGISTRATION SUPPLEMENTAL REGISTER	
May 23, 2008	EXAMINER'S AMENDMENT ENTERED	88888
May 23, 2008	NOTIFICATION OF EXAMINERS AMENDMENT E-MAILED	6328
May 23, 2008	EXAMINERS AMENDMENT E-MAILED	6328
May 23, 2008	EXAMINERS AMENDMENT -WRITTEN	77875
May 08, 2008	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
May 08, 2008	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
May 08, 2008	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Jan. 05, 2008	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Jan. 05, 2008	NON-FINAL ACTION E-MAILED	6325
Jan. 05, 2008	NON-FINAL ACTION WRITTEN	77875
Dec. 29, 2007	ASSIGNED TO EXAMINER	77875
Oct. 02, 2007	NEW APPLICATION ENTERED IN TRAM	

# Maintenance Filings or Post Registration Information

Affidavit of Section 8 - Accepted  
Continued Use:  
Renewal Date: Jul. 01, 2018

## TM Staff and Location Information

### TM Staff Information - None

#### File Location

Current Location: GENERIC WEB UPDATE

Date in Location: Apr. 13, 2018

## Assignment Abstract Of Title Information

### Summary

Total Assignments: 2

Registrant: Covenant Review, LLC

### Assignment 1 of 2

Conveyance: SECURITY AGREEMENT

Reel/Frame: [5509/0437](#)

Pages: 5

Date Recorded: May 04, 2015

Supporting Documents: [assignment-tm-5509-0437.pdf](#)

#### Assignor

Name: [COVENANT REVIEW, LLC](#)

Execution Date: May 04, 2015

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country: NEW YORK  
Where Organized:

#### Assignee

Name: [WEBSTER BANK, NATIONAL ASSOCIATION](#)

Legal Entity Type: NATIONAL ASSOCIATION

State or Country: UNITED STATES  
Where Organized:

Address: 80 ELM STREET  
NEW HAVEN, CONNECTICUT 06510

#### Correspondent

Correspondent Name: DWAYNE C. HOUSTON

Correspondent Address: 1025 VERMONT AVENUE NW, SUITE 1130  
NATIONAL CORPORATE RESEARCH, LTD.  
WASHINGTON, DC 20005

#### Domestic Representative - Not Found

### Assignment 2 of 2

Conveyance: RELEASE BY SECURED PARTY

Reel/Frame: [6372/0913](#)

Pages: 5

Date Recorded: Jul. 05, 2018

Supporting Documents: [assignment-tm-6372-0913.pdf](#)

#### Assignor

Name: [WEBSTER BANK, NATIONAL ASSOCIATION](#)

Execution Date: Jul. 03, 2018

Legal Entity Type: NATIONAL BANKING ASSOCIATION

State or Country: UNITED STATES  
Where Organized:

#### Assignee

Name: [COVENANT REVIEW, LLC](#)

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country: NEW YORK  
Where Organized:

Address: 25 W. 45TH STREET  
SUITE 1000

NEW YORK, NEW YORK 10036

**Correspondent**

**Correspondent Name:** CORPORATION SERVICE COMPANY

**Correspondent Address:** 1090 VERMONT AVENUE, NW  
WASHINGTON, DC 20005

**Domestic Representative - Not Found**

**Generated on:** This page was generated by TSDR on 2019-08-16 10:26:37 EDT

**Mark:** FINANCIAL INDEPENDENCE REVIEW

FINANCIAL INDEPENDENCE  
REVIEW

**US Serial Number:** 88303188

**Application Filing Date:** Feb. 15, 2019

**Filed as TEAS Plus:** Yes

**Currently TEAS Plus:** Yes

**Register:** Principal

**Mark Type:** Service Mark

**TM5 Common Status Descriptor:**



LIVE/APPLICATION/Under Examination

The trademark application has been accepted by the Office (has met the minimum filing requirements) and that this application has been assigned to an examiner.

**Status:** A non-final Office action has been sent (issued) to the applicant. This is a letter from the examining attorney requiring additional information and/or making an initial refusal. The applicant must respond to this Office action. To view all documents in this file, click on the Trademark Document Retrieval link at the top of this page.

**Status Date:** Apr. 29, 2019

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## Mark Information

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**Mark Literal Elements:** FINANCIAL INDEPENDENCE REVIEW

**Standard Character Claim:** Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

**Mark Drawing Type:** 4 - STANDARD CHARACTER MARK

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((...)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*...\* identify additional (new) wording in the goods/services.

**For:** Financial advice; Financial advice, namely, budget planning; Financial analyses; Financial analysis; Financial analysis and consultation; Financial asset management; Financial consultancy; Financial consultation; Financial consulting; Financial evaluation for insurance purposes; Financial information; Financial investment brokerage; Financial investment brokerage services; Financial planning; Financial planning and investment advisory services; Financial planning consultation; Financial planning for retirement; Financial retirement plan consulting services; Financial risk assessment services; Financial risk management; Financial services, namely, administration of transactions involving funds drawn from securities, stocks, funds, equities, bonds, cash, or other types of financial investments in retirement plans using a check or negotiable order of withdrawal over a global data network; Financial services, namely, administration of transactions involving funds drawn from securities, stocks, funds, equities, bonds, cash, or other types of financial investments in retirement plans using a credit or debit card over a global data network; Financial trust planning; Financial administration of RETIREMENT PLANS; Providing information, commentary and advice in the field of finance, financial investments and financial valuations; Providing investors with financial information

**International Class(es):** 036 - Primary Class

**U.S Class(es):** 100, 101, 102

**Class Status:** ACTIVE

**Basis:** 1(a)

**First Use:** May 30, 2018

**Use in Commerce:** May 30, 2018

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## Basis Information (Case Level)

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**Filed Use:** Yes

**Currently Use:** Yes

**Filed ITU:** No

**Currently ITU:** No

**Filed 44D:** No

**Currently 44E:** No

Filed 44E: No

Currently 66A: No

Filed 66A: No

Currently No Basis: No

Filed No Basis: No

## Current Owner(s) Information

**Owner Name:** Lord and Richards, Inc.

**Owner Address:** Suite 400  
1745 Shea Center Drive  
Englewood, COLORADO UNITED STATES 80129

**Legal Entity Type:** CORPORATION

**State or Country** COLORADO  
**Where Organized:**

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** James A. Sheridan

**Docket Number:** 81293.0002

**Attorney Primary** [jsheridan@sheridanlaw.com](mailto:jsheridan@sheridanlaw.com)  
**Email Address:**

**Attorney Email** Yes  
**Authorized:**

### Correspondent

**Correspondent** JAMES A. SHERIDAN  
**Name/Address:** SHERIDAN LAW, LLC  
1600 JACKSON STREET  
SUITE 350  
GOLDEN, COLORADO UNITED STATES 80401

**Phone:** 303-953-9083

**Fax:** 720-548-9810

**Correspondent e-mail:** [jsheridan@sheridanlaw.com](mailto:jsheridan@sheridanlaw.com) [email@sheridanlaw.com](mailto:email@sheridanlaw.com)

**Correspondent e-mail** Yes  
**Authorized:**

**Domestic Representative - Not Found**

## Prosecution History

Date	Description	Proceeding Number
Apr. 29, 2019	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Apr. 29, 2019	NON-FINAL ACTION E-MAILED	6325
Apr. 29, 2019	NON-FINAL ACTION WRITTEN	93428
Apr. 29, 2019	ASSIGNED TO EXAMINER	93428
Mar. 08, 2019	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Feb. 19, 2019	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

### TM Staff Information

**TM Attorney:** HOWELL, MATTHEW PATTEN

**Law Office** LAW OFFICE 123  
**Assigned:**

### File Location

**Current Location:** TMO LAW OFFICE 123 - EXAMINING  
ATTORNEY ASSIGNED

**Date in Location:** Apr. 29, 2019

Generated on: This page was generated by TSDR on 2019-08-16 10:27:11 EDT

Mark: FIND 59 FINANCIAL REVIEW



US Serial Number: 87002087

Application Filing Date: Apr. 15, 2016

US Registration Number: 5179503

Registration Date: Apr. 11, 2017

Filed as TEAS RF: Yes

Currently TEAS RF: Yes

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Apr. 11, 2017

Publication Date: Jan. 24, 2017

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## Mark Information

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Mark Literal Elements: FIND 59 FINANCIAL REVIEW

Standard Character Claim: No

Mark Drawing Type: 3 - AN ILLUSTRATION DRAWING WHICH INCLUDES WORD(S)/ LETTER(S)/NUMBER(S)

Description of Mark: The mark consists of the phase "FIND 59 FINANCIAL REVIEW" written horizontally with the "59" element appearing in the center of two vertically aligned semi-circles shown in segmented lines and the word "FINANCIAL" stacked on top of the word "REVIEW".

Color(s) Claimed: Color is not claimed as a feature of the mark.

Disclaimer: "FINANCIAL REVIEW"

Design Search Code(s): 26.01.06 - Semi-circles; Circles, semi

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis (()) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Financial investment services, namely, providing investment analysis, consultation; financial planning for retirement; financial analysis and consultation; financial planning; investment brokerage; securities trade execution services; insurance consultation; insurance brokerage; insurance administration

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Jan. 2014

Use in Commerce: Jan. 2014

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## Basis Information (Case Level)

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Filed Use: Yes

Currently Use: Yes

Amended Use: No

Filed ITU: No

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

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## Current Owner(s) Information

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**Owner Name:** Manufacturers and Traders Trust Company

**Owner Address:** One M&T Plaza  
Buffalo, NEW YORK 14203  
UNITED STATES

**Legal Entity Type:** CORPORATION

**State or Country** NEW YORK  
**Where Organized:**

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## Attorney/Correspondence Information

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### Attorney of Record

**Attorney Name:** Daniel F. Dovi

**Docket Number:** 002000.10406

**Attorney Primary** [ddovi@hodgsonruss.com](mailto:ddovi@hodgsonruss.com)  
**Email Address:**

**Attorney Email** Yes  
**Authorized:**

### Correspondent

**Correspondent** DANIEL F. DOVI  
**Name/Address:** HODGSON RUSS LLP  
THE GUARANTY BUILDING  
140 PEARL STREET, SUITE 100  
BUFFALO, NEW YORK 14202  
UNITED STATES

**Phone:** 716.856.4000

**Fax:** 716.849.0349

**Correspondent e-mail:** [ddovi@hodgsonruss.com](mailto:ddovi@hodgsonruss.com) [ipdocketing@hodgsonruss.com](mailto:ipdocketing@hodgsonruss.com)

**Correspondent e-mail** Yes  
**Authorized:**

### Domestic Representative - Not Found

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## Prosecution History

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Date	Description	Proceeding Number
Apr. 11, 2017	REGISTERED-PRINCIPAL REGISTER	
Jan. 24, 2017	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Jan. 24, 2017	PUBLISHED FOR OPPOSITION	
Jan. 04, 2017	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Dec. 14, 2016	APPROVED FOR PUB - PRINCIPAL REGISTER	
Dec. 01, 2016	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
Dec. 01, 2016	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
Dec. 01, 2016	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Aug. 08, 2016	NOTIFICATION OF PRIORITY ACTION E-MAILED	6326
Aug. 08, 2016	PRIORITY ACTION E-MAILED	6326
Aug. 08, 2016	PRIORITY ACTION WRITTEN	76581
Aug. 01, 2016	ASSIGNED TO EXAMINER	76581
Apr. 21, 2016	NOTICE OF DESIGN SEARCH CODE E-MAILED	
Apr. 20, 2016	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Apr. 19, 2016	NEW APPLICATION ENTERED IN TRAM	

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## TM Staff and Location Information

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### TM Staff Information - None

#### File Location

**Current Location:** PUBLICATION AND ISSUE SECTION

**Date in Location:** Apr. 11, 2017



Generated on: This page was generated by TSDR on 2019-08-16 10:27:42 EDT

Mark: FORENSIC REVIEWS OF LIFE INSURANCE

Forensic Reviews of Life  
Insurance

US Serial Number: 86793918

Application Filing Date: Oct. 20, 2015

US Registration Number: 4992051

Registration Date: Jul. 05, 2016

Filed as TEAS Plus: Yes

Currently TEAS Plus: Yes

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Jul. 05, 2016

Publication Date: Apr. 19, 2016

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## Mark Information

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Mark Literal Elements: FORENSIC REVIEWS OF LIFE INSURANCE

Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

Mark Drawing Type: 4 - STANDARD CHARACTER MARK

Disclaimer: "REVIEWS OF LIFE INSURANCE"

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Insurance consulting in the field of Life insurance

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: May 01, 2014

Use in Commerce: May 07, 2014

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## Basis Information (Case Level)

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Filed Use: Yes

Currently Use: Yes

Amended Use: No

Filed ITU: No

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

---

## Current Owner(s) Information

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Owner Name: Sheridan Wealth Advisors

DBA, AKA, Formerly: DBA Sheridan Wealth Advisors

Owner Address: Suite #307  
1108 Kane Concourse

Bay Harbor, FLORIDA 33154  
UNITED STATES

Legal Entity Type: CORPORATION

State or Country: FLORIDA  
Where Organized:

## Attorney/Correspondence Information

Attorney of Record - None  
Correspondent

Correspondent Name/Address: SHERIDAN WEALTH ADVISORS  
1108 KANE CONCOURSE  
SUITE #307  
BAY HARBOR, FLORIDA 33154  
UNITED STATES

Phone: 3058617773

Fax: 3058657442

Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Jul. 05, 2016	REGISTERED-PRINCIPAL REGISTER	
Apr. 19, 2016	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Apr. 19, 2016	PUBLISHED FOR OPPOSITION	
Mar. 30, 2016	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Mar. 15, 2016	LAW OFFICE PUBLICATION REVIEW COMPLETED	68171
Mar. 11, 2016	ASSIGNED TO LIE	68171
Feb. 16, 2016	APPROVED FOR PUB - PRINCIPAL REGISTER	
Feb. 16, 2016	EXAMINER'S AMENDMENT ENTERED	88888
Feb. 16, 2016	NOTIFICATION OF EXAMINERS AMENDMENT E-MAILED	6328
Feb. 16, 2016	EXAMINERS AMENDMENT E-MAILED	6328
Feb. 16, 2016	EXAMINERS AMENDMENT -WRITTEN	81876
Feb. 10, 2016	ASSIGNED TO EXAMINER	81876
Oct. 24, 2015	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Oct. 23, 2015	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

TM Staff Information - None  
File Location

Current Location: PUBLICATION AND ISSUE SECTION

Date in Location: Jul. 05, 2016

**Generated on:** This page was generated by TSDR on 2019-08-16 10:23:04 EDT

**Mark:** FORENSIC REVIEWS OF LIFE SETTLEMENTS

Forensic Reviews of Life  
Settlements

**US Serial Number:** 87889291

**Application Filing Date:** Apr. 23, 2018

**US Registration Number:** 5797125

**Registration Date:** Jul. 09, 2019

**Filed as TEAS Plus:** Yes

**Currently TEAS Plus:** Yes

**Register:** Principal

**Mark Type:** Service Mark

**TM5 Common Status Descriptor:**



LIVE/REGISTRATION/Issued and Active

The trademark application has been registered with the Office.

**Status:** Registered. The registration date is used to determine when post-registration maintenance documents are due.

**Status Date:** Jul. 09, 2019

**Publication Date:** Apr. 23, 2019

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## Mark Information

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**Mark Literal Elements:** FORENSIC REVIEWS OF LIFE SETTLEMENTS

**Standard Character Claim:** Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

**Mark Drawing Type:** 4 - STANDARD CHARACTER MARK

**Disclaimer:** "REVIEWS OF LIFE SETTLEMENTS"

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## Related Properties Information

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**Claimed Ownership of US Registrations:** 4931629, 4992051

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

**For:** Insurance consulting in the field of Life insurance; Insurance services, namely, insurance eligibility review and verification and consultation in the Life Insurance industry; Insurance services, namely, viatical settlement services, life settlement services for insurance policyholders, and senior settlement services for insurance policyholders; Life insurance brokerage; Financial services, namely, life insurance settlement services

**International Class(es):** 036 - Primary Class

**U.S Class(es):** 100, 101, 102

**Class Status:** ACTIVE

**Basis:** 1(a)

**First Use:** Feb. 01, 2018

**Use in Commerce:** Feb. 01, 2018

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## Basis Information (Case Level)

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**Filed Use:** Yes

**Currently Use:** Yes

Filed ITU: No

Currently ITU: No

Filed 44D: No

Currently 44E: No

Filed 44E: No

Currently 66A: No

Filed 66A: No

Currently No Basis: No

Filed No Basis: No

## Current Owner(s) Information

**Owner Name:** Sheridan Wealth Advisors, Inc.

**Owner Address:** 160 Bal Cross Drive  
Bal Harbour, FLORIDA UNITED STATES 33154

**Legal Entity Type:** CORPORATION

**State or Country** FLORIDA  
**Where Organized:**

## Attorney/Correspondence Information

Attorney of Record - None

Correspondent

**Correspondent Name/Address:** SHERIDAN WEALTH ADVISORS, INC.  
160 BAL CROSS DRIVE  
BAL HARBOUR, FLORIDA UNITED STATES 33154

**Phone:** 305-861-7773

Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Jul. 09, 2019	REGISTERED-PRINCIPAL REGISTER	
Apr. 23, 2019	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Apr. 23, 2019	PUBLISHED FOR OPPOSITION	
Apr. 03, 2019	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Mar. 15, 2019	APPROVED FOR PUB - PRINCIPAL REGISTER	
Mar. 14, 2019	EXAMINER'S AMENDMENT ENTERED	88888
Mar. 14, 2019	NOTIFICATION OF EXAMINERS AMENDMENT E-MAILED	6328
Mar. 14, 2019	EXAMINERS AMENDMENT E-MAILED	6328
Mar. 14, 2019	EXAMINERS AMENDMENT -WRITTEN	93421
Feb. 25, 2019	TEAS/EMAIL CORRESPONDENCE ENTERED	69712
Feb. 25, 2019	CORRESPONDENCE RECEIVED IN LAW OFFICE	69712
Feb. 22, 2019	ASSIGNED TO LIE	69712
Feb. 17, 2019	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Aug. 18, 2018	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Aug. 18, 2018	NON-FINAL ACTION E-MAILED	6325
Aug. 18, 2018	NON-FINAL ACTION WRITTEN	93421
Aug. 13, 2018	ASSIGNED TO EXAMINER	93421
May 02, 2018	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Apr. 26, 2018	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

TM Staff Information - None

File Location

**Current Location:** PUBLICATION AND ISSUE SECTION

**Date in Location:** Jul. 09, 2019

Generated on: This page was generated by TSDR on 2019-08-16 10:28:10 EDT

Mark: LIBERTY MUTUAL REALTIME REVIEW

Liberty Mutual RealTime  
Review

US Serial Number: 86803939

Application Filing Date: Oct. 29, 2015

US Registration Number: 5370585

Registration Date: Jan. 02, 2018

Filed as TEAS RF: Yes

Currently TEAS RF: Yes

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Jan. 02, 2018

Publication Date: Mar. 15, 2016

Notice of Allowance Date: May 10, 2016

## Mark Information

Mark Literal Elements: LIBERTY MUTUAL REALTIME REVIEW

Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

Mark Drawing Type: 4 - STANDARD CHARACTER MARK

Disclaimer: "REALTIME REVIEW"

## Goods and Services

### Note:

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Insurance claims processing, assessing and administration, all in the field of automotive, casualty and property insurance

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Jun. 01, 2017

Use in Commerce: Jun. 01, 2017

## Basis Information (Case Level)

Filed Use: No

Currently Use: Yes

Amended Use: No

Filed ITU: Yes

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

## Current Owner(s) Information

Owner Name: Liberty Mutual Insurance Company

Owner Address: 175 Berkeley Street  
Boston, MASSACHUSETTS 02116

UNITED STATES

Legal Entity Type: CORPORATION

State or Country Where Organized: MASSACHUSETTS

## Attorney/Correspondence Information

### Attorney of Record

Attorney Name: Rebecca Lederhouse

Docket Number: 151092

Attorney Primary Email Address: [chiusptomail@bakermckenzie.com](mailto:chiusptomail@bakermckenzie.com)

Attorney Email Authorized: Yes

### Correspondent

Correspondent Name/Address: REBECCA LEDERHOUSE  
BAKER & MCKENZIE LLP  
300 EAST RANDOLPH STREET, SUITE 5000  
CHICAGO, ILLINOIS 60601  
UNITED STATES

Phone: 312-861-8949

Fax: 312-698-2710

Correspondent e-mail: [chiusptomail@bakermckenzie.com](mailto:chiusptomail@bakermckenzie.com)

Correspondent e-mail Authorized: Yes

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Jan. 02, 2018	REGISTERED-PRINCIPAL REGISTER	
Nov. 28, 2017	NOTICE OF ACCEPTANCE OF STATEMENT OF USE E-MAILED	
Nov. 27, 2017	ALLOWED PRINCIPAL REGISTER - SOU ACCEPTED	
Nov. 04, 2017	STATEMENT OF USE PROCESSING COMPLETE	65362
Oct. 19, 2017	USE AMENDMENT FILED	65362
Nov. 03, 2017	CASE ASSIGNED TO INTENT TO USE PARALEGAL	65362
Oct. 19, 2017	TEAS STATEMENT OF USE RECEIVED	
May 05, 2017	NOTICE OF APPROVAL OF EXTENSION REQUEST E-MAILED	
May 03, 2017	EXTENSION 2 GRANTED	98765
May 03, 2017	EXTENSION 2 FILED	98765
May 03, 2017	TEAS EXTENSION RECEIVED	
Nov. 05, 2016	NOTICE OF APPROVAL OF EXTENSION REQUEST E-MAILED	
Nov. 03, 2016	EXTENSION 1 GRANTED	98765
Nov. 03, 2016	EXTENSION 1 FILED	98765
Nov. 03, 2016	TEAS EXTENSION RECEIVED	
May 10, 2016	NOA E-MAILED - SOU REQUIRED FROM APPLICANT	
Mar. 15, 2016	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Mar. 15, 2016	PUBLISHED FOR OPPOSITION	
Feb. 24, 2016	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Feb. 10, 2016	LAW OFFICE PUBLICATION REVIEW COMPLETED	66121
Feb. 03, 2016	ASSIGNED TO LIE	66121
Jan. 06, 2016	APPROVED FOR PUB - PRINCIPAL REGISTER	
Dec. 29, 2015	TEAS/EMAIL CORRESPONDENCE ENTERED	88889
Dec. 28, 2015	CORRESPONDENCE RECEIVED IN LAW OFFICE	88889
Dec. 28, 2015	TEAS RESPONSE TO OFFICE ACTION RECEIVED	
Dec. 17, 2015	NOTIFICATION OF NON-FINAL ACTION E-MAILED	6325
Dec. 17, 2015	NON-FINAL ACTION E-MAILED	6325
Dec. 17, 2015	NON-FINAL ACTION WRITTEN	76487
Dec. 16, 2015	ASSIGNED TO EXAMINER	76487
Nov. 03, 2015	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Nov. 02, 2015	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

**TM Staff Information - None**

**File Location**

**Current Location:** PUBLICATION AND ISSUE SECTION

**Date in Location:** Nov. 27, 2017

## Proceedings

**Summary**

**Number of Proceedings:** 4

**Type of Proceeding: Opposition**

**Proceeding Number:** [91250095](#)

**Filing Date:** Aug 09, 2019

**Status:** Pending

**Status Date:** Aug 09, 2019

**Interlocutory Attorney:** MIKE WEBSTER

**Defendant**

**Name:** Liberty Bell Insurance, Corp.

**Correspondent Address:** LIBERTY BELL INSURANCE, CORP.  
LIBERTY BELL INSURANCE, CORP.  
1217 W 44TH PL  
HIALEAH FL , 33012

**Correspondent e-mail:** [Libertybell@bellsouth.net](mailto:Libertybell@bellsouth.net)

**Associated marks**

Mark	Application Status	Serial Number	Registration Number
LIBERTY BELL INSURANCE	Opposition Pending	<a href="#">88187317</a>	

**Plaintiff(s)**

**Name:** Liberty Mutual Insurance Company

**Correspondent Address:** REBECCA B. LEDERHOUSE  
BAKER & MCKENZIE LLP  
300 EAST RANDOLPH STREET, SUITE 5000  
CHICAGO IL , 60601  
UNITED STATES

**Correspondent e-mail:** [Rebecca.Lederhouse@BakerMcKenzie.com](mailto:Rebecca.Lederhouse@BakerMcKenzie.com) , [David.Davis@BakerMcKenzie.com](mailto:David.Davis@BakerMcKenzie.com) , [Shima.Roy@BakerMcKenzie.com](mailto:Shima.Roy@BakerMcKenzie.com) , [chiusptomail@bakermckenzie.com](mailto:chiusptomail@bakermckenzie.com)

**Associated marks**

Mark	Application Status	Serial Number	Registration Number
LIBERTY MUTUAL	REGISTERED AND RENEWED	<a href="#">76391591</a>	<a href="#">2734195</a>
LIBERTYONE	REGISTERED AND RENEWED	<a href="#">75778698</a>	<a href="#">2726209</a>
A LIBERTY MUTUAL COMPANY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513087</a>	<a href="#">4252896</a>
LIBERTY LIFE	Registered	<a href="#">85605446</a>	<a href="#">4605944</a>
LIBERTY LIFE'S SPECTRUM SELECT	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396897</a>	<a href="#">3675098</a>
LIBERTY LIFE'S SPECTRUM SELECT PLUS	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396928</a>	<a href="#">3675099</a>
THE LIBERTY SECURITY ACCOUNT	REGISTERED AND RENEWED	<a href="#">73801371</a>	<a href="#">1608477</a>
LIBERTY DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">74395138</a>	<a href="#">1899465</a>
LIBERTY NORTHWEST	REGISTERED AND RENEWED	<a href="#">75777802</a>	<a href="#">2348832</a>
LIBERTY ADVANCED DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">76033790</a>	<a href="#">2492242</a>
LIBERTY INTERNATIONAL UNDERWRITERS	REGISTERED AND RENEWED	<a href="#">78393145</a>	<a href="#">2992030</a>
LIBERTY INTERNATIONAL	REGISTERED AND RENEWED	<a href="#">78157911</a>	<a href="#">3010455</a>
MYLIBERTYASSIST	REGISTERED AND RENEWED	<a href="#">78817569</a>	<a href="#">3183853</a>
MYLIBERTYCONNECTION	REGISTERED AND RENEWED	<a href="#">78901527</a>	<a href="#">3255679</a>
MYLIBERTYMOBILE	Registered	<a href="#">85981036</a>	<a href="#">4499621</a>
LIBERTY INSURANCE UNDERWRITERS INC.	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85581101</a>	<a href="#">4253201</a>
LIBERTY MUTUAL INNOVATION	Registered	<a href="#">87301601</a>	<a href="#">5363001</a>

LIBERTY MUTUAL NAVIGATOR	Registered	<a href="#">86252908</a>	<a href="#">4842133</a>
LIBERTY MUTUAL REALTIME REVIEW	Registered	<a href="#">86803939</a>	<a href="#">5370585</a>
LIBERTY SERIES ESTATE MAXIMIZER NEXT GENERATION	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85380101</a>	<a href="#">4118274</a>
LIBERTY STANDS WITH YOU	Registered	<a href="#">87057883</a>	<a href="#">5197236</a>
LIBERTYGUARD	REGISTERED AND RENEWED	<a href="#">74486966</a>	<a href="#">1874201</a>
LIBERTY MUTUAL HOMESHARING COVERAGE	Registered	<a href="#">87314338</a>	<a href="#">5389669</a>
LIBERTY MUTUAL SMART HOME	Registered	<a href="#">86345551</a>	<a href="#">5335708</a>
LIBERTY MUTUAL INSURANCE	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85512722</a>	<a href="#">4256502</a>
LIBERTY MUTUAL INSURANCE	REGISTERED AND RENEWED	<a href="#">73564102</a>	<a href="#">1405249</a>
LIBERTY MUTUAL ACCIDENT & HEALTH	Registered	<a href="#">86142223</a>	<a href="#">4701039</a>
LIBERTY MUTUAL REINSURANCE	Registered	<a href="#">85513207</a>	<a href="#">4365441</a>
LIBERTY MUTUAL SURETY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513178</a>	<a href="#">4362057</a>

#### Prosecution History

Entry Number	History Text	Date	Due Date
1	FILED AND FEE	Aug 09, 2019	
2	NOTICE AND TRIAL DATES SENT; ANSWER DUE:	Aug 09, 2019	Sep 18, 2019
3	INSTITUTED	Aug 09, 2019	

#### Type of Proceeding: Opposition

**Proceeding Number:** [91247620](#)

**Filing Date:** Apr 17, 2019

**Status:** Terminated

**Status Date:** Jul 17, 2019

**Interlocutory Attorney:** ELIZABETH WINTER

#### Defendant

**Name:** The Trustees of the Liberty Credit Union & Private Trust and The Trustee of the Liberty Credit Union & Private Trust

**Correspondent Address:** THE TRUSTEES OF THE LIBERTY CREDIT UNION  
16192 COASTAL HIGHWAY  
LEWES DE , 19958  
UNITED STATES

**Correspondent e-mail:** [eurochamber@gmx.com](mailto:eurochamber@gmx.com)

#### Associated marks

Mark	Application Status	Serial Number	Registration Number
LUB LIBERTY UNION BANK	Abandoned - After Inter-Partes Decision	<a href="#">88029880</a>	
LIBERTY UNION BANK	Abandoned - After Inter-Partes Decision	<a href="#">88029868</a>	

#### Plaintiff(s)

**Name:** Liberty Mutual Insurance Company

**Correspondent Address:** REBECCA B LEDERHOUSE  
BAKER & MCKENZIE LLP  
300 EAST RANDOLPH STREET, SUITE 5000  
CHICAGO IL , 60601  
UNITED STATES

**Correspondent e-mail:** [rebecca.lederhouse@bakermckenzie.com](mailto:rebecca.lederhouse@bakermckenzie.com) , [chiusptomail@bakermckenzie.com](mailto:chiusptomail@bakermckenzie.com)

#### Associated marks

Mark	Application Status	Serial Number	Registration Number
LIBERTY MUTUAL	REGISTERED AND RENEWED	<a href="#">76391591</a>	<a href="#">2734195</a>
LIBERTYONE	REGISTERED AND RENEWED	<a href="#">75778698</a>	<a href="#">2726209</a>
A LIBERTY MUTUAL COMPANY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513087</a>	<a href="#">4252896</a>
LIBERTY LIFE	Registered	<a href="#">85605446</a>	<a href="#">4605944</a>
LIBERTY LIFE'S SPECTRUM SELECT	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396897</a>	<a href="#">3675098</a>
LIBERTY LIFE'S SPECTRUM SELECT PLUS	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396928</a>	<a href="#">3675099</a>
THE LIBERTY SECURITY ACCOUNT	REGISTERED AND RENEWED	<a href="#">73801371</a>	<a href="#">1608477</a>
LIBERTY DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">74395138</a>	<a href="#">1899465</a>



LIBERTY NORTHWEST	REGISTERED AND RENEWED	<a href="#">75777802</a>	<a href="#">2348832</a>
LIBERTY ADVANCED DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">76033790</a>	<a href="#">2492242</a>
LIBERTY INTERNATIONAL UNDERWRITERS	REGISTERED AND RENEWED	<a href="#">78393145</a>	<a href="#">2992030</a>
LIBERTY INTERNATIONAL	REGISTERED AND RENEWED	<a href="#">78157911</a>	<a href="#">3010455</a>
MYLIBERTYASSIST	REGISTERED AND RENEWED	<a href="#">78817569</a>	<a href="#">3183853</a>
MYLIBERTYCONNECTION	REGISTERED AND RENEWED	<a href="#">78901527</a>	<a href="#">3255679</a>
MYLIBERTYMOBILE	Registered	<a href="#">85981036</a>	<a href="#">4499621</a>
LIBERTY INSURANCE UNDERWRITERS INC.	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85581101</a>	<a href="#">4253201</a>
LIBERTY MUTUAL INNOVATION	Registered	<a href="#">87301601</a>	<a href="#">5363001</a>
LIBERTY MUTUAL NAVIGATOR	Registered	<a href="#">86252908</a>	<a href="#">4842133</a>
LIBERTY MUTUAL REALTIME REVIEW	Registered	<a href="#">86803939</a>	<a href="#">5370585</a>
LIBERTY SERIES ESTATE MAXIMIZER NEXT GENERATION	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85380101</a>	<a href="#">4118274</a>
LIBERTY STANDS WITH YOU	Registered	<a href="#">87057883</a>	<a href="#">5197236</a>
LIBERTYGUARD	REGISTERED AND RENEWED	<a href="#">74486966</a>	<a href="#">1874201</a>
LIBERTY MUTUAL HOMESHARING COVERAGE	Registered	<a href="#">87314338</a>	<a href="#">5389669</a>
LIBERTY MUTUAL SMART HOME	Registered	<a href="#">86345551</a>	<a href="#">5335708</a>
LIBERTY MUTUAL INSURANCE	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85512722</a>	<a href="#">4256502</a>
LIBERTY MUTUAL INSURANCE	REGISTERED AND RENEWED	<a href="#">73564102</a>	<a href="#">1405249</a>
LIBERTY MUTUAL ACCIDENT & HEALTH	Registered	<a href="#">86142223</a>	<a href="#">4701039</a>
LIBERTY MUTUAL REINSURANCE	Registered	<a href="#">85513207</a>	<a href="#">4365441</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85512738</a>	<a href="#">4256503</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85513114</a>	<a href="#">4252897</a>
LIBERTY MUTUAL SURETY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513178</a>	<a href="#">4362057</a>

#### Prosecution History

Entry Number	History Text	Date	Due Date
1	FILED AND FEE	Apr 17, 2019	
2	NOTICE AND TRIAL DATES SENT; ANSWER DUE:	Apr 17, 2019	May 27, 2019
3	INSTITUTED	Apr 17, 2019	
4	NOTICE OF DEFAULT	Jun 06, 2019	
5	BD DECISION: OPP SUSTAINED	Jul 17, 2019	
6	TERMINATED	Jul 17, 2019	

#### Type of Proceeding: Opposition

**Proceeding Number:** [91246115](#)

**Filing Date:** Jan 29, 2019

**Status:** Suspended

**Status Date:** May 09, 2019

**Interlocutory Attorney:** GEOFFREY MCNUTT

#### Defendant

**Name:** Moreno, David, Joseph, Benjamin

**Correspondent Address:** CHARLES FRANK  
7 EAST 35TH STREET, 14A  
NEW YORK NY , 10016  
UNITED STATES

**Correspondent e-mail:** [charles@racharles.com](mailto:charles@racharles.com)

#### Associated marks

Mark	Application Status	Serial Number	Registration Number
LIBERTY HOME GUARD	Opposition Pending	<a href="#">87876359</a>	

#### Plaintiff(s)

**Name:** Liberty Mutual Insurance Company

**Correspondent Address:** REBECCA LEDERHOUSE  
BAKER & MCKENZIE LLP  
300 E RANDOLPH STREET, SUITE 5000  
CHICAGO IL , 60601

UNITED STATES

Correspondent e-mail: [chiusptomail@bakermckenzie.com](mailto:chiusptomail@bakermckenzie.com) , [rebecca.lederhouse@bakermckenzie.com](mailto:rebecca.lederhouse@bakermckenzie.com)

Mark	Application Status	Serial Number	Registration Number
LIBERTY MUTUAL	REGISTERED AND RENEWED	<a href="#">76391591</a>	<a href="#">2734195</a>
LIBERTYONE	REGISTERED AND RENEWED	<a href="#">75778698</a>	<a href="#">2726209</a>
A LIBERTY MUTUAL COMPANY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513087</a>	<a href="#">4252896</a>
LIBERTY LIFE	Registered	<a href="#">85605446</a>	<a href="#">4605944</a>
LIBERTY LIFE'S SPECTRUM SELECT	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396897</a>	<a href="#">3675098</a>
LIBERTY LIFE'S SPECTRUM SELECT PLUS	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396928</a>	<a href="#">3675099</a>
THE LIBERTY SECURITY ACCOUNT	REGISTERED AND RENEWED	<a href="#">73801371</a>	<a href="#">1608477</a>
LIBERTY DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">74395138</a>	<a href="#">1899465</a>
LIBERTY NORTHWEST	REGISTERED AND RENEWED	<a href="#">75777802</a>	<a href="#">2348832</a>
LIBERTY ADVANCED DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">76033790</a>	<a href="#">2492242</a>
LIBERTY INTERNATIONAL UNDERWRITERS	REGISTERED AND RENEWED	<a href="#">78393145</a>	<a href="#">2992030</a>
LIBERTY INTERNATIONAL	REGISTERED AND RENEWED	<a href="#">78157911</a>	<a href="#">3010455</a>
MYLIBERTYASSIST	REGISTERED AND RENEWED	<a href="#">78817569</a>	<a href="#">3183853</a>
MYLIBERTYCONNECTION	REGISTERED AND RENEWED	<a href="#">78901527</a>	<a href="#">3255679</a>
MYLIBERTYMOBILE	Registered	<a href="#">85981036</a>	<a href="#">4499621</a>
LIBERTY INSURANCE UNDERWRITERS INC.	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85581101</a>	<a href="#">4253201</a>
LIBERTY MUTUAL INNOVATION	Registered	<a href="#">87301601</a>	<a href="#">5363001</a>
LIBERTY MUTUAL NAVIGATOR	Registered	<a href="#">86252908</a>	<a href="#">4842133</a>
LIBERTY MUTUAL REALTIME REVIEW	Registered	<a href="#">86803939</a>	<a href="#">5370585</a>
LIBERTY SERIES ESTATE MAXIMIZER NEXT GENERATION	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85380101</a>	<a href="#">4118274</a>
LIBERTY STANDS WITH YOU	Registered	<a href="#">87057883</a>	<a href="#">5197236</a>
LIBERTYGUARD	REGISTERED AND RENEWED	<a href="#">74486966</a>	<a href="#">1874201</a>
LIBERTY MUTUAL HOMESHARING COVERAGE	Registered	<a href="#">87314338</a>	<a href="#">5389669</a>
LIBERTY MUTUAL SMART HOME	Registered	<a href="#">86345551</a>	<a href="#">5335708</a>
LIBERTY MUTUAL INSURANCE	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85512722</a>	<a href="#">4256502</a>
LIBERTY MUTUAL INSURANCE	REGISTERED AND RENEWED	<a href="#">73564102</a>	<a href="#">1405249</a>
LIBERTY MUTUAL ACCIDENT & HEALTH	Registered	<a href="#">86142223</a>	<a href="#">4701039</a>
LIBERTY MUTUAL REINSURANCE	Registered	<a href="#">85513207</a>	<a href="#">4365441</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85512738</a>	<a href="#">4256503</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85513114</a>	<a href="#">4252897</a>
LIBERTY MUTUAL SURETY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513178</a>	<a href="#">4362057</a>

**Prosecution History**

Entry Number	History Text	Date	Due Date
1	FILED AND FEE	Jan 29, 2019	
2	NOTICE AND TRIAL DATES SENT; ANSWER DUE:	Jan 29, 2019	Mar 10, 2019
3	PENDING, INSTITUTED	Jan 29, 2019	
4	STIP FOR EXT	Mar 11, 2019	
5	EXTENSION OF TIME GRANTED	Mar 18, 2019	
6	D MOT TO DISMISS: FRCP 12(B)	May 09, 2019	
7	P OPP/RESP TO MOTION	May 29, 2019	
8	SUSP PEND DISP OF OUTSTNDNG MOT	Jun 18, 2019	

**Type of Proceeding: Opposition**

Proceeding Number: [91242448](#)

Filing Date: Jul 17, 2018

Status: Terminated

Status Date: Dec 13, 2018

Interlocutory Attorney: ELIZABETH WINTER

**Defendant****Name:** Liberty Bankers Life Insurance Company**Correspondent Address:** TIMOTHY J ZARLEY  
ZARLEY LAW FIRM PLC  
400 LOCUST STREET CAPITAL SQ STE 200  
DES MOINES IA , 50309-2350  
UNITED STATES**Correspondent e-mail:** [tzarley@zarleylaw.com](mailto:tzarley@zarleylaw.com) , [kconrad@zarleylaw.com](mailto:kconrad@zarleylaw.com)**Associated marks**

Mark	Application Status	Serial Number	Registration Number
LIBERTY BANKERS INSURANCE GROUP	Registered	<a href="#">87639905</a>	<a href="#">5659011</a>

**Plaintiff(s)****Name:** Liberty Mutual Insurance Company**Correspondent Address:** LISA PARKER GATES  
BAKER MCKENZIE  
300 E RANDOLPH DRIVE SUITE 5000  
CHICAGO IL , 60601  
UNITED STATES**Correspondent e-mail:** [lisa.gates@bakermckenzie.com](mailto:lisa.gates@bakermckenzie.com) , [meri.mclaughlin@bakermckenzie.com](mailto:meri.mclaughlin@bakermckenzie.com)**Associated marks**

Mark	Application Status	Serial Number	Registration Number
LIBERTY MUTUAL	REGISTERED AND RENEWED	<a href="#">76391591</a>	<a href="#">2734195</a>
LIBERTY MUTUAL INSURANCE	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85512722</a>	<a href="#">4256502</a>
LIBERTY MUTUAL INSURANCE	REGISTERED AND RENEWED	<a href="#">73564102</a>	<a href="#">1405249</a>
LIBERTY SURPLUS INSURANCE CORPORATION	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85505076</a>	<a href="#">4249053</a>
LIBERTY MUTUAL ACCIDENT & HEALTH	Registered	<a href="#">86142223</a>	<a href="#">4701039</a>
LIBERTY MUTUAL REINSURANCE	Registered	<a href="#">85513207</a>	<a href="#">4365441</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85512738</a>	<a href="#">4256503</a>
LIBERTY MUTUAL AGENCY CORPORATION	Cancelled - Section 8	<a href="#">85513114</a>	<a href="#">4252897</a>
LIBERTY INTERNATIONAL UNDERWRITERS	REGISTERED AND RENEWED	<a href="#">78157899</a>	<a href="#">2891140</a>
LIBERTY MUTUAL SURETY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513178</a>	<a href="#">4362057</a>
LIBERTY SPECIALTY MARKETS	Registered	<a href="#">86075225</a>	<a href="#">4989010</a>
A LIBERTY MUTUAL COMPANY	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85513087</a>	<a href="#">4252896</a>
LIBERTY MUTUAL AGENCY CORPORATION	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85032755</a>	<a href="#">3994941</a>
LIBERTY MUTUAL ASSIST	Registered	<a href="#">86244808</a>	<a href="#">4640715</a>
LIBERTY MUTUAL DEDUCTIBLE FUND	Registered	<a href="#">85947837</a>	<a href="#">4679496</a>
LIBERTY MUTUAL HOMESHARING COVERAGE	Registered	<a href="#">87314338</a>	<a href="#">5389669</a>
LIBERTY MUTUAL INNOVATION	Registered	<a href="#">87301601</a>	<a href="#">5363001</a>
LIBERTY MUTUAL NAVIGATOR	Registered	<a href="#">86252908</a>	<a href="#">4842133</a>
LIBERTY MUTUAL REALTIME REVIEW	Registered	<a href="#">86803939</a>	<a href="#">5370585</a>
LIBERTY MUTUAL SMART HOME	Registered	<a href="#">86345551</a>	<a href="#">5335708</a>
LIBERTY STANDS WITH YOU	Registered	<a href="#">87057883</a>	<a href="#">5197236</a>
LIBERTY SURETYFIRST	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85032927</a>	<a href="#">3893817</a>
LIBERTYGUARD	REGISTERED AND RENEWED	<a href="#">74486966</a>	<a href="#">1874201</a>
LIBERTYONE	REGISTERED AND RENEWED	<a href="#">75778698</a>	<a href="#">2726209</a>
LIBERTY LIFE	Registered	<a href="#">85605446</a>	<a href="#">4605944</a>
LIBERTY LIFE ASSURANCE COMPANY	Registered	<a href="#">85605451</a>	<a href="#">5151371</a>
LIBERTY LIFE ASSURANCE COMPANY OF BOSTON	Registered	<a href="#">85605461</a>	<a href="#">4457340</a>
LIBERTY LIFE'S SPECTRUM SELECT	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396897</a>	<a href="#">3675098</a>
LIBERTY LIFE'S SPECTRUM SELECT PLUS	Section 8 and 15 - Accepted and Acknowledged	<a href="#">77396928</a>	<a href="#">3675099</a>
THE LIBERTY SECURITY ACCOUNT	REGISTERED AND RENEWED	<a href="#">73801371</a>	<a href="#">1608477</a>
LIBERTY DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">74395138</a>	<a href="#">1899465</a>

LIBERTY NORTHWEST	REGISTERED AND RENEWED	<a href="#">75777802</a>	<a href="#">2348832</a>
LIBERTY ADVANCED DAYONE DISABILITY	REGISTERED AND RENEWED	<a href="#">76033790</a>	<a href="#">2492242</a>
LIBERTY INTERNATIONAL UNDERWRITERS	REGISTERED AND RENEWED	<a href="#">78393145</a>	<a href="#">2992030</a>
LIBERTY INTERNATIONAL	REGISTERED AND RENEWED	<a href="#">78157911</a>	<a href="#">3010455</a>
LIBERTY INSURANCE UNDERWRITERS INC.	Section 8 and 15 - Accepted and Acknowledged	<a href="#">85581101</a>	<a href="#">4253201</a>
MYLIBERTYASSIST	REGISTERED AND RENEWED	<a href="#">78817569</a>	<a href="#">3183853</a>
MYLIBERTYCONNECTION	REGISTERED AND RENEWED	<a href="#">78901527</a>	<a href="#">3255679</a>
MYLIBERTYMOBILE	Registered	<a href="#">85981036</a>	<a href="#">4499621</a>

**Prosecution History**

Entry Number	History Text	Date	Due Date
1	FILED AND FEE	Jul 17, 2018	
2	NOTICE AND TRIAL DATES SENT; ANSWER DUE:	Jul 17, 2018	Aug 26, 2018
3	PENDING, INSTITUTED	Jul 17, 2018	
4	ANSWER	Aug 27, 2018	
5	W/DRAW OF OPPOSITION	Dec 12, 2018	
6	BD DECISION: OPP DISMISSED W/ PREJ	Dec 13, 2018	
7	TERMINATED	Dec 13, 2018	

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Mark: MILESTONE REVIEW METHOD

MILESTONE REVIEW METHOD

**US Serial Number:** 85455484      **Application Filing Date:** Oct. 25, 2011  
**US Registration Number:** 4161155      **Registration Date:** Jun. 19, 2012  
**Filed as TEAS Plus:** Yes      **Currently TEAS Plus:** Yes  
**Register:** Principal  
**Mark Type:** Service Mark  
**Status:** A Sections 8 and 15 combined declaration has been accepted and acknowledged.  
**Status Date:** May 24, 2018  
**Publication Date:** Apr. 03, 2012

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## Mark Information

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**Mark Literal Elements:** MILESTONE REVIEW METHOD  
**Standard Character Claim:** Yes. The mark consists of standard characters without claim to any particular font style, size, or color.  
**Mark Drawing Type:** 4 - STANDARD CHARACTER MARK

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## Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis (...) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*.\* identify additional (new) wording in the goods/services.

**For:** Financial planning  
**International Class(es):** 036 - Primary Class      **U.S Class(es):** 100, 101, 102  
**Class Status:** ACTIVE  
**Basis:** 1(a)  
**First Use:** Nov. 2001      **Use in Commerce:** Nov. 2001

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## Basis Information (Case Level)

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<b>Filed Use:</b> Yes	<b>Currently Use:</b> Yes	<b>Amended Use:</b> No
<b>Filed ITU:</b> No	<b>Currently ITU:</b> No	<b>Amended ITU:</b> No
<b>Filed 44D:</b> No	<b>Currently 44D:</b> No	<b>Amended 44D:</b> No
<b>Filed 44E:</b> No	<b>Currently 44E:</b> No	<b>Amended 44E:</b> No
<b>Filed 66A:</b> No	<b>Currently 66A:</b> No	
<b>Filed No Basis:</b> No	<b>Currently No Basis:</b> No	

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## Current Owner(s) Information

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**Owner Name:** Financial Foundations, Inc.  
**Owner Address:** Suite 1008  
One Research Drive  
Westborough, MASSACHUSETTS 01581  
UNITED STATES

Legal Entity Type: CORPORATION

State or Country: MASSACHUSETTS  
Where Organized:

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** Ping Hu, Esq. **Docket Number:** 17866-00011  
**Attorney Primary Email Address:** [phu@mirickoconnell.com](mailto:phu@mirickoconnell.com) **Attorney Email Authorized:** Yes

### Correspondent

**Correspondent Name/Address:** Ping Hu, Esq.  
MIRICK O'CONNELL DEMALLIE & LOUGEE LLP  
175 Federal Street, Suite 1220  
Boston, MASSACHUSETTS 02110  
UNITED STATES  
**Phone:** 617.391.2168 **Fax:** 617.275.4006  
**Correspondent e-mail:** [phu@mirickoconnell.com](mailto:phu@mirickoconnell.com) [trademarks@mirickoconnell.com](mailto:trademarks@mirickoconnell.com) **Correspondent e-mail Authorized:** Yes

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
May 24, 2018	NOTICE OF ACCEPTANCE OF SEC. 8 & 15 - E-MAILED	
May 24, 2018	REGISTERED - SEC. 8 (6-YR) ACCEPTED & SEC. 15 ACK.	66607
May 24, 2018	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	66607
May 11, 2018	TEAS SECTION 8 & 15 RECEIVED	
Jun. 19, 2017	COURTESY REMINDER - SEC. 8 (6-YR) E-MAILED	
Jun. 19, 2012	REGISTERED-PRINCIPAL REGISTER	
Apr. 03, 2012	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Apr. 03, 2012	PUBLISHED FOR OPPOSITION	
Mar. 14, 2012	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Feb. 13, 2012	APPROVED FOR PUB - PRINCIPAL REGISTER	
Feb. 11, 2012	ASSIGNED TO EXAMINER	78326
Oct. 28, 2011	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Oct. 28, 2011	NEW APPLICATION ENTERED IN TRAM	

## Maintenance Filings or Post Registration Information

**Affidavit of Continued Use:** Section 8 - Accepted

**Affidavit of Incontestability:** Section 15 - Accepted

## TM Staff and Location Information

### TM Staff Information - None

#### File Location

**Current Location:** TMEG LAW OFFICE 105

**Date in Location:** May 24, 2018

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Mark: QP REVIEW

## QP REVIEW

US Serial Number: 85910991

Application Filing Date: Apr. 22, 2013

US Registration Number: 4443682

Registration Date: Dec. 03, 2013

Register: Principal

Mark Type: Service Mark

Status: Registered. The registration date is used to determine when post-registration maintenance documents are due.

Status Date: Dec. 03, 2013

Publication Date: Sep. 17, 2013

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### Mark Information

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Mark Literal Elements: QP REVIEW

Standard Character Claim: Yes. The mark consists of standard characters without claim to any particular font style, size, or color.

Mark Drawing Type: 4 - STANDARD CHARACTER MARK

Acquired Distinctiveness Claim: In whole

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### Related Properties Information

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Claimed Ownership of US Registrations: 3420910

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### Goods and Services

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**Note:**

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Consultation services concerning employee pension and/or retirement plans, namely, plan design advice, analysis and evaluation of plan documents, analysis and evaluation of plan performance, administration advice, and investment advice

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Mar. 05, 2008

Use in Commerce: Mar. 05, 2008

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### Basis Information (Case Level)

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Filed Use: Yes

Currently Use: Yes

Amended Use: No

Filed ITU: No

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

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## Current Owner(s) Information

**Owner Name:** Pension Consultants, Inc.

**Owner Address:** 300 S. Campbell  
Springfield, MISSOURI 65806  
UNITED STATES

**Legal Entity Type:** CORPORATION

**State or Country** MISSOURI  
**Where Organized:**

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** Jonathan A. Bay

**Docket Number:** 785-1

**Attorney Primary** [jb@jonbay.com](mailto:jb@jonbay.com)  
**Email Address:**

**Attorney Email** Yes  
**Authorized:**

### Correspondent

**Correspondent** JONATHAN A. BAY  
**Name/Address:** ATTORNEY AT LAW  
1736 E SUNSHINE ST STE 410  
SPRINGFIELD, MISSOURI 65804-1330  
UNITED STATES

**Phone:** 417-873-9100

**Fax:** 417-873-9546

**Correspondent e-** [jb@jonbay.com](mailto:jb@jonbay.com)  
**mail:**

**Correspondent e-** Yes  
**mail Authorized:**

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Dec. 03, 2018	COURTESY REMINDER - SEC. 8 (6-YR) E-MAILED	
Dec. 03, 2013	REGISTERED-PRINCIPAL REGISTER	
Sep. 17, 2013	OFFICIAL GAZETTE PUBLICATION CONFIRMATION E-MAILED	
Sep. 17, 2013	PUBLISHED FOR OPPOSITION	
Aug. 28, 2013	NOTIFICATION OF NOTICE OF PUBLICATION E-MAILED	
Aug. 07, 2013	APPROVED FOR PUB - PRINCIPAL REGISTER	
Aug. 07, 2013	ASSIGNED TO EXAMINER	73703
Apr. 29, 2013	NEW APPLICATION OFFICE SUPPLIED DATA ENTERED IN TRAM	
Apr. 25, 2013	NEW APPLICATION ENTERED IN TRAM	

## TM Staff and Location Information

### TM Staff Information - None

### File Location

**Current Location:** PUBLICATION AND ISSUE SECTION

**Date in Location:** Dec. 03, 2013



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Mark: ROLLOVER REVIEW

## ROLLOVER REVIEW

US Serial Number: 76355068

Application Filing Date: Jan. 03, 2002

US Registration Number: 2807168

Registration Date: Jan. 20, 2004

Register: Principal

Mark Type: Service Mark

Status: The registration has been renewed.

Status Date: Feb. 06, 2014

Publication Date: Nov. 19, 2002

Notice of Allowance Date: Feb. 11, 2003

## Mark Information

Mark Literal Elements: ROLLOVER REVIEW

Standard Character Claim: No

Mark Drawing Type: 1 - TYPESET WORD(S) /LETTER(S) /NUMBER(S)

Disclaimer: "ROLLOVER"

## Goods and Services

### Note:

The following symbols indicate that the registrant/owner has amended the goods/services:

- Brackets [...] indicate deleted goods/services;
- Double parenthesis ((.)) identify any goods/services not claimed in a Section 15 affidavit of incontestability; and
- Asterisks \*..\* identify additional (new) wording in the goods/services.

For: Providing financial information and analysis regarding retirement strategies

International Class(es): 036 - Primary Class

U.S Class(es): 100, 101, 102

Class Status: ACTIVE

Basis: 1(a)

First Use: Jan. 2002

Use in Commerce: Jan. 2002

## Basis Information (Case Level)

Filed Use: No

Currently Use: Yes

Amended Use: No

Filed ITU: Yes

Currently ITU: No

Amended ITU: No

Filed 44D: No

Currently 44D: No

Amended 44D: No

Filed 44E: No

Currently 44E: No

Amended 44E: No

Filed 66A: No

Currently 66A: No

Filed No Basis: No

Currently No Basis: No

## Current Owner(s) Information

Owner Name: MORGAN STANLEY DOMESTIC HOLDINGS, INC.

Owner Address: 1585 BROADWAY  
NEW YORK, NEW YORK 10036  
UNITED STATES

Legal Entity Type: CORPORATION

State or Country Where Organized: DELAWARE

## Attorney/Correspondence Information

### Attorney of Record

**Attorney Name:** Dorothy R. Whitney

**Docket Number:** 28596/026/DR

### Correspondent

**Correspondent Name/Address:** Dorothy R. Whitney  
COWAN LIEBOWITZ & LATMAN PC  
114 West 47th Street  
NEW YORK, NEW YORK 10036-1525  
UNITED STATES

**Phone:** 212-790-9200

**Fax:** 212-575-0671

**Correspondent e-mail:** [trademark@cll.com](mailto:trademark@cll.com)

**Correspondent e-mail Authorized:** Yes

### Domestic Representative - Not Found

## Prosecution History

Date	Description	Proceeding Number
Feb. 08, 2017	AUTOMATIC UPDATE OF ASSIGNMENT OF OWNERSHIP	
Mar. 31, 2016	TEAS CHANGE OF CORRESPONDENCE RECEIVED	
Feb. 06, 2014	NOTICE OF ACCEPTANCE OF SEC. 8 & 9 - MAILED	
Feb. 06, 2014	REGISTERED AND RENEWED (FIRST RENEWAL - 10 YRS)	76533
Feb. 06, 2014	REGISTERED - SEC. 8 (10-YR) ACCEPTED/SEC. 9 GRANTED	76533
Jan. 17, 2014	REGISTERED - COMBINED SECTION 8 (10-YR) & SEC. 9 FILED	76533
Feb. 06, 2014	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	76533
Jan. 17, 2014	TEAS SECTION 8 & 9 RECEIVED	
Jul. 15, 2010	REGISTERED - SEC. 8 (6-YR) ACCEPTED	68973
Jul. 14, 2010	CASE ASSIGNED TO POST REGISTRATION PARALEGAL	68973
Jul. 13, 2010	TEAS SECTION 8 RECEIVED	
Jun. 24, 2009	AUTOMATIC UPDATE OF ASSIGNMENT OF OWNERSHIP	
Jan. 20, 2004	REGISTERED-PRINCIPAL REGISTER	
Oct. 29, 2003	ALLOWED PRINCIPAL REGISTER - SOU ACCEPTED	
Oct. 15, 2003	ASSIGNED TO EXAMINER	76726
Oct. 11, 2003	CASE FILE IN TICRS	
Jul. 30, 2003	STATEMENT OF USE PROCESSING COMPLETE	
Jul. 30, 2003	USE AMENDMENT FILED	
Aug. 04, 2003	PAPER RECEIVED	
Jul. 16, 2003	EXTENSION 1 GRANTED	
Jul. 09, 2003	EXTENSION 1 FILED	
Jul. 09, 2003	TEAS EXTENSION RECEIVED	
Jun. 10, 2003	TEAS CHANGE OF CORRESPONDENCE RECEIVED	
Mar. 26, 2003	PAPER RECEIVED	
Feb. 11, 2003	NOA MAILED - SOU REQUIRED FROM APPLICANT	
Nov. 19, 2002	PUBLISHED FOR OPPOSITION	
Oct. 30, 2002	NOTICE OF PUBLICATION	
Sep. 10, 2002	APPROVED FOR PUB - PRINCIPAL REGISTER	
Jul. 31, 2002	CORRESPONDENCE RECEIVED IN LAW OFFICE	
Jul. 31, 2002	PAPER RECEIVED	
Apr. 09, 2002	NON-FINAL ACTION MAILED	
Mar. 28, 2002	ASSIGNED TO EXAMINER	76726

## Maintenance Filings or Post Registration Information

**Affidavit of Continued Use:** Section 8 - Accepted

**Renewal Date:** Jan. 20, 2014

## TM Staff and Location Information

### TM Staff Information - None

#### File Location

Current Location: GENERIC WEB UPDATE

Date in Location: Feb. 06, 2014

## Assignment Abstract Of Title Information

### Summary

Total Assignments: 3

Registrant: MORGAN STANLEY

### Assignment 1 of 3

Conveyance: CHANGE OF NAME

Reel/Frame: [2614/0814](#)

Pages: 8

Date Recorded: Mar. 06, 2003

Supporting Documents: [assignment-tm-2614-0814.pdf](#)

#### Assignor

Name: [MORGAN STANLEY DEAN WITTER & CO.](#)

Execution Date: Jun. 18, 2002

Legal Entity Type: CORPORATION

State or Country Where Organized: DELAWARE

#### Assignee

Name: [MORGAN STANLEY](#)

Legal Entity Type: CORPORATION

State or Country Where Organized: DELAWARE

Address: 1585 BROADWAY  
NEW YORK, NEW YORK 10036

#### Correspondent

Correspondent Name: COWAN, LIEBOWITZ & LATMAN, P.C.

Correspondent Address: BAILA H. CELEDONIA  
1133 AVENUE OF THE AMERICAS  
NEW YORK, NY 10036

#### Domestic Representative - Not Found

### Assignment 2 of 3

Conveyance: ASSIGNS THE ENTIRE INTEREST

Reel/Frame: [4007/0658](#)

Pages: 4

Date Recorded: Jun. 18, 2009

Supporting Documents: [assignment-tm-4007-0658.pdf](#)

#### Assignor

Name: [MORGAN STANLEY](#)

Execution Date: May 31, 2009

Legal Entity Type: CORPORATION

State or Country Where Organized: DELAWARE

#### Assignee

Name: [MORGAN STANLEY SMITH BARNEY HOLDINGS LLC](#)

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country Where Organized: DELAWARE

Address: 2000 WESTCHESTER AVENUE  
PURCHASE, NEW YORK 10577

#### Correspondent

Correspondent Name: BAILA H. CELEDONIA

Correspondent Address: 1133 AVENUE OF THE AMERICAS  
NEW YORK, NY 10036

Domestic Representative - Not Found

Assignment 3 of 3

Conveyance: MERGER EFFECTIVE 12/31/2016

Reel/Frame: [5965/0087](#)

Pages: 5

Date Recorded: Jan. 12, 2017

Supporting Documents: [assignment-tm-5965-0087.pdf](#)

Assignor

Name: [MORGAN STANLEY SMITH BARNEY HOLDINGS LLC](#)

Execution Date: Dec. 20, 2016

Legal Entity Type: LIMITED LIABILITY COMPANY

State or Country Where Organized: DELAWARE

Assignee

Name: [MORGAN STANLEY DOMESTIC HOLDINGS, INC.](#)

Legal Entity Type: CORPORATION

State or Country Where Organized: DELAWARE

Address: 1585 BROADWAY  
NEW YORK, NEW YORK 10036

Correspondent

Correspondent Name: DOROTHY R. WHITNEY, COWAN, LIEBOWITZ

Correspondent Address: 114 WEST 47TH STREET  
21ST FLOOR  
NEW YORK, NY 10036-1525

Domestic Representative - Not Found