



BAY STATE IP

10 Post Office Square, Suite 800 South, Boston, MA 02109
617.439.3200 (phone) | 617.507.0757 (facsimile) | www.baystatepatent.com

Patents • Trademarks • Copyrights

TRADEMARK DISCLOSURE WORKSHEET

INSTRUCTIONS

This worksheet is designed to assist the trademark owner(s) in documenting and providing information to our firm to evaluate the potential patentability of a proposed invention and to provide options to the trademark owner(s) for possible trademark protection with the United States Patent & Trademark Office.

The following series of questions are meant to provide the trademark owner(s), or the prospective applicant for a Federal United States trademark registration, with a manner to reflect upon and refine a proposed trademark, including identifying the goods or services under which the trademark will be used, and to initially put forth in writing details that will be necessary in preparing a trademark application.

The more information provided by you initially allows for wholly thorough evaluation of your proposed trademark.

TRADEMARK OWNER(S)

The United States Patent & Trademark Office classifies an “owner” of a trademark as an individual who has conceived of a name, logo, character or design and has continually used the trademark since the date of conception.

However, if the trademark owner discontinues use, the trademark owner can no longer enforce the trademark.



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Applicant Information

An applicant or trademark owner may apply for a registration of a trademark as any of a number of entities including as an individual, a partnership (of which there exist many genres) or a corporate entity (again of which there exist many genres). For control of an intellectual property portfolio purposes, Federally registered trademarks, as well as trademark applications, are wholly transferrable in the form of licenses or assignments.

Please fill out the below area for the applicable entity

INDIVIDUAL

1. Name of applicant _____
2. Domicile Address _____
3. Telephone Number _____
4. Email address _____
5. US Citizen Yes__ No__ Country _____
6. Website of Individual _____

PARTNERSHIP

1. Name of Partnership _____
2. Names of Partners _____
3. Citizenship of Partners _____
4. Address of Partnership _____
5. Telephone and Fax No. _____
6. Email address of Part. _____
7. Website of Partnership. _____

CORPORATION

1. Name of Corporation _____
2. U.S. State of Corp. _____
3. Country of Corp. (Non-U.S.) _____
4. Date of Incorporation _____
5. Address of Corp. _____
6. Telephone and Fax No. _____
7. Email address of Corp. _____
8. Website of Corp. _____



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Nature of Trademark/Service/Logo/Character

Word Mark: _____

(List the trademark or servicemark with spelling and letter spacing of choice)

Stylized Logo/Character Mark: – Please provide a .PDF or JPG file of the Stylized Logo/Character Mark and list any written terms that included.

Trademark Identification of Goods and Services

Below please describe, in full detail, your goods and/or services under which the trademark is, or will be, utilized

Filing Basis (United States)

1. Intent to Use – this basis covers the situation wherein you have conceived of your trademark, but have yet to use the trademark or have suspended use of the trademark in interstate commerce but there is a bona fide intent to use the mark in the near future. Under this filing basis, we will require no further information for filing.
2. Use in Commerce – this basis covers the situation wherein you are continually using the trademark in interstate commerce. The use of the mark must be genuine and not a token use for the purpose of obtaining of a registration. Under this filing basis, we will require the following information for filing:

- The Date of first use of the trademark anywhere: _____
- The Date of first use of the trademark in commerce in the United States: _____
- Proof of Use of the trademark, specifically a specimen in digital form such as JPEG or .PDF.

For goods related marks, a web site, tags, labels or package are some examples of items that meet the requirements.

For service related marks, a web site, advertisements, or brochures are some examples of items that meet the requirements.



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Priority Upon Non-U.S. Filings or Trademarks

If you have any filed any prior applicable trademark applications or received any applicable trademark registrations in other jurisdictions or countries, please list these below, as a claim for priority may be available to you.

STATEMENT OF CONFIDENTIALITY AND RELATIONSHIP

Bay State IP, LLC, its employees and agents, hereby agree to keep confidential and secret all information submitted to the firm, and agrees not to disclose any information without the discloser's written permission and/or will return the information submitted upon request. Please be aware that completing and submitting this Invention Disclosure Worksheet DOES NOT establish an Attorney-Client Relationship with Bay State IP, LLC. Only following a conflict check and upon signed our engagement letter, will an Attorney-Client relationship be established with Bay State IP, LLC.