Rationale for Trademark Policies and Procedures

1. General Information of the Policies and Procedures

1.1 The following policies and procedures have been adopted to protect the use and integrity of the training and practice of Ortho-Bionomy. The Society of Ortho-Bionomy International, Inc. (the "Society") has completed the process of registering the term "Ortho-Bionomy", the Sand Dollar logo, and the collective membership term "Society of Ortho-Bionomy International" with the United States Patent and Trademark Office to ensure that Ortho-Bionomy is represented in ways that are appropriate.

1.2 A trademark is a word, name, symbol, design or any combination of them that a business or organization uses to identify its goods or services and uses to distinguish its goods and services from those of others. Many trademark owners use a "TM" symbol with their mark to claim rights to it. After a trademark is registered with the federal government, the owner of the trademark is entitled to use the "®" symbol to identify its trademark.

1.3 Trademarks are symbols of quality. These following policies and procedures establish standards of training for those who can use the term Ortho-Bionomy as well the Society's other trademarks. In crafting this document the Society is protecting the ability of individuals to practice and instructors to teach Ortho-Bionomy by assuring the public of the competency of the Society's members who provide Ortho-Bionomy services.

1.4 The trademarks that the Society has registered are the sole property of the Society and it is the Society's responsibility to monitor and regulate their use. Once an organization has a trademark registered, it needs to be diligent in protecting its trademark rights. If an organization ignores inappropriate usage, it runs the risk of losing its trademark rights.

1.5 The following policies and procedures constitute the legal license granted to members of the Society to enable them to use these marks. The Society's lawyers have guided the Board of Directors in constructing a legal license that uses the correct legal language necessary to protect the Society's marks. Our lawyers have assured us of the following policies and procedures and that the way they are stated is the best way of protecting these trademarks.

1.6 The trademark policies and procedures clearly state how members may use the Society's Registered Trademarks. If an individual chooses to no longer be a member

of the Society, they also can no longer use the trademarks for which they were qualified. Their legal license to use these marks is ended. (Individuals, however, may renew their membership and, upon completion of any training requirements, have their trademark privileges reinstated).

1.7 By stating clearly who may use the Society's Registered Trademarks we will be able to respond directly to situations where these marks may be used inappropriately or illegally. Members who use the trademarks in any way other than as outlined in the policy or any individuals who use these trademarks and are not members of the Society are in violation of federal trademark law.

1.8 If you have any questions about the trademark regulations, please contact the Society office and we will assist you with compliance with these policies.

2. Introduction to Trademark Policies and Procedures

2.1 The Society owns three registered trademarks:

2.1.1 Ortho-Bionomy®

2.1.2 Society of Ortho-Bionomy International®

2.1.3 Sand Dollar design

2.2 The Society encourages its members to promotes their individual Ortho-Bionomy practices in ways that maintain the integrity and the reputation of the Society's programs and services. As a member of the Society, you may use the Society's trademarks to promote your bodywork services if you follow these policies and procedures.

2.3 **Only members may use these trademarks to promote or sell services similar to the services of the Society.** The Society encourages members to report the improper use of the Society's trademarks.

3. Use of Society Trademarks in Members' Promotional Literature

3.1 Members of the Society may use the Society's trademarks in promotional literature in various ways, depending on their membership status. Their membership must be current, with all dues paid, and continuing education completed as appropriate per level.

3.1.1 Student Members

3.1.1.1 A Student Member has not completed requirements for Associate Membership. You may state you are a Student member of the Society of Ortho-Bionomy International®. You may not use any of the Society's trademarks outside of stating you are a Student member.

3.1.2 Associate Members

3.1.2.1.1 Associate Members have completed the training requirements for Associate membership. You may state you are a member of Society of Ortho-Bionomy International®. You may also use the term Ortho-Bionomy® in your promotional literature by listing Ortho-Bionomy® among the bodywork modalities that you practice. However, you may not use the Society's trademarks in any way that suggest that you specialize in, or exclusively practices, Ortho-Bionomy®. You may not use the Society's trademarks in any way that suggests that you have completed the Society's Registered Practitioner Training Program. Therefore, you may not use the words "registered", "practitioner", or "instructor" in conjunction with the term Ortho-Bionomy®. Associate Members may not use the Sand Dollar trademark.

3.1.3 Professional Members

3.1.3.1 Professional Membership of the Society includes two classes: Practitioner and Instructor Members. Professional Members, like Associate Members, may state that they are members of the Society of Ortho-Bionomy International®, and they may use the term Ortho-Bionomy® in their promotional literature.

3.1.3.1.1 Practitioner Members

3.1.3.1.2 Practitioner Members have completed the Registered Practitioner Training Program. Practitioner Members may use the phrase "Registered Practitioner of Ortho-Bionomy®" or "Registered Advanced Practitioner of Ortho-Bionomy®", depending on their level.

3.1.3.1.3 Instructor Members

3.1.3.1.3.1 Instructor Members must complete additional instructor training and apprenticeship. Instructor members may use the phrase "Registered Associate Instructor of Ortho-Bionomy®", "Registered Instructor of Ortho-Bionomy®", "Registered Associate Advanced Instructor of Ortho-Bionomy®", or "Registered Advanced Instructor of Ortho-Bionomy®", depending on their level.

3.1.3.1.3.2 In order to ensure that Ortho-Bionomy training meets the standards of the Society, on request from the Board, instructor members must submit their instructional materials to the Society for review and approval.

3.1.3.2 Professional Members may also use the Sand Dollar trademark in the promotion of their Ortho-Bionomy practices. However, the Sand Dollar trademark may not be used as a personal logo of any member. The Sand

Dollar trademark may be used in any size, but it may not be modified in any other way. Examples of unacceptable modifications include the superimposition of type over the mark or the reproduction of only a portion of the Sand Dollar mark.

4. Appropriate Presentation of the Trademarks

4.1 In common usage the "®" must appear the first time the term "Ortho-Bionomy" or "Society of Ortho-Bionomy International" is used in a document, brochure, website page, class outline, or any other literature. After its initial use in the document, you should NOT use the "®" for any of the subsequent appearances of these trademarks. The "®" must appear superscripted after the term.

5. Required Statement of Ownership and Registration

5.1 In order to alert others to the legal status of the Society's trademarks, all members must provide notice of the Society's ownership and registration when using one of the Society's trademarks. The Society's trademarks must always include the symbol "®" which indicates that the mark is federally registered. You must also include a statement of registration and ownership, in one of the following forms or combinations, depending on which trademark you use:

5.1.1 *Society of Ortho-Bionomy International® is a registered trademark that indicates membership in the Society, and is used with permission.*

5.1.2 *Ortho-Bionomy® is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.*

5.1.3 *The Sand Dollar design is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.*

5.1.4 *Ortho-Bionomy® and the Sand Dollar design are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.*

5.1.5 *Ortho Bionomy®, the Sand Dollar design, and Society of Ortho-Bionomy International® are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.*

5.2 You should place the statement of registration and ownership in a conspicuous position near the trademark, such as the bottom of the page on which the trademark first appears, or on the first page of the document. In a brochure, you may place the statement of registration and ownership in the body of the brochure. On a website, you may place the statement or registration at the bottom of the page.

5.3 Associate and Professional Members may use Ortho-Bionomy® and Society of Ortho-Bionomy International® on business cards and social media content. No statement

of registration and ownership is required, though you must always use the symbol "®". Social media content may not be for sale without authorization from SOBI.

6. Uses of Society Trademarks Requiring Licensing Agreements

6.1 The Society must approve, in writing, any use of the Society's trademarks other than those listed above. Uses requiring authorization include instructional materials, video or audio recordings, merchandise such as T-shirts, buttons, and pins, and any other use not listed above.

6.2 If you would like authorization to use the Society's trademarks in one of these ways, you should apply for a license from the Society. The application must include:

6.2.1 A description of the item to which the Society trademark(s) will be affixed and, if available, samples of the item.

6.2.2 Information about the production of the item, including the name of the producer, publisher, or manufacturer, a description of the quality controls to be used by the producer, the member of pieces to be produced, and an estimate of the production costs and the retail price of the final product.

6.2.3 Information about the distribution and marketing of the item, including the potential customers and audience for the item, and the proposed promotion, sales, and marketing of the item.

6.2.4 The time period to be covered by the potential agreement with the Society.

6.2.5 If the Society's Board of Directors approves your application, the Board will draft a licensing agreement to be signed by the applicant and a Board representative.