

TRADEMARK ASSIGNMENT COVER SHEET

Electronic Version v1.1
Stylesheet Version v1.2

ETAS ID: TM522578

SUBMISSION TYPE:	NEW ASSIGNMENT		
NATURE OF CONVEYANCE:	Notice of Succession of Agency		
CONVEYING PARTY DATA			
Name	Formerly	Execution Date	Entity Type
Credit Suisse AG, Cayman Islands Branch		05/06/2019	Bank: UNITED STATES
RECEIVING PARTY DATA			
Name:	JPMorgan Chase Bank, N.A., Successor Agent		
Street Address:	10 S Dearborn		
City:	Chicago		
State/Country:	ILLINOIS		
Postal Code:	60603		
Entity Type:	Bank: UNITED STATES		
PROPERTY NUMBERS Total: 25			
Property Type	Number	Word Mark	
Registration Number:	4498626	BLUCORA	
Registration Number:	5351985	BLUVEST	
Registration Number:	4790938	LEGALACT	
Registration Number:	3671163	8 WEALTH MANAGEMENT ISSUES	
Registration Number:	2047321	HD VEST FINANCIAL SERVICES	
Registration Number:	2561056	HDVLINK	
Registration Number:	2431408	MANAGING AMERICA'S FUTURE	
Registration Number:	2415760	VESTADVISOR	
Registration Number:	4393223	VESTADVISOR SELECT	
Registration Number:	2415762	VESTPREMIERE	
Registration Number:	4476961	THE FINANCIAL SERVICES FIRM OF TAX PROFE	
Registration Number:	4648020	1040 ANALYST	
Registration Number:	5010645	1040 ANALYST	
Registration Number:	4758756	VESTSUCCESS	
Registration Number:	4725216	VESTVISION	
Registration Number:	4868095	V4 CLIENT EXPERIENCE	
Registration Number:	4702224	REINVENT YOURSELF	
Registration Number:	3667993	DONATION ASSISTANT	
Registration Number:	4329023	FEEL THE FREE	
TRADEMARK			

OP \$640.00 4498626

Property Type	Number	Word Mark
Registration Number:	3773717	FREE TO PREPARE, FREE TO PRINT, FREE TO
Registration Number:	2394116	TAXACT
Registration Number:	3141614	TAXACT
Registration Number:	3138631	TAXACT ONLINE
Registration Number:	5187281	YOU GOT THIS
Registration Number:	5187282	TAXACT

CORRESPONDENCE DATA

Fax Number: 8009144240
Correspondence will be sent to the e-mail address first; if that is unsuccessful, it will be sent using a fax number, if provided; if that is unsuccessful, it will be sent via US Mail.
Phone: 614-280-3566
Email: james.murray@wolterskluwer.com
Correspondent Name: James Murray
Address Line 1: 4400 Easton Commons Way, Suite 125
Address Line 2: CT Corporation
Address Line 4: Columbus, OHIO 43219

NAME OF SUBMITTER:	Doris Ka
SIGNATURE:	/Doris Ka/
DATE SIGNED:	05/08/2019

Total Attachments: 10
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RECORDATION FORM COVER SHEET TRADEMARKS ONLY

To the Director of the U. S. Patent and Trademark Office: Please record the attached documents or the new address(es) below.

1. Name of conveying party(ies):

Credit Suisse AG, Cayman Islands Branch

- Individual(s)
- Partnership
- Corporation- State: _____
- Other Bank
- Association
- Limited Partnership

Citizenship (see guidelines) USA

Additional names of conveying parties attached? Yes No

3. Nature of conveyance/Execution Date(s) :

Execution Date(s) May 6, 2019

- Assignment
- Security Agreement
- Other Notice of Succession of Agency
- Merger
- Change of Name

2. Name and address of receiving party(ies)

Additional names, addresses, or citizenship attached? Yes No

Name: JPMorgan Chase Bank, N.A., Successor Agent

Street Address: 10 S Dearborn

City: Chicago

State: IL

Country: USA Zip: 60603

- Individual(s) Citizenship _____
- Association Citizenship _____
- Partnership Citizenship _____
- Limited Partnership Citizenship _____
- Corporation Citizenship _____
- Other Bank Citizenship USA

If assignee is not domiciled in the United States, a domestic representative designation is attached: Yes No
(Designations must be a separate document from assignment)

4. Application number(s) or registration number(s) and identification or description of the Trademark.

A. Trademark Application No.(s) Text

B. Trademark Registration No.(s)

see attached Schedule B

Additional sheet(s) attached? Yes No

C. Identification or Description of Trademark(s) (and Filing Date if Application or Registration Number is unknown):

5. Name & address of party to whom correspondence concerning document should be mailed:

Name: Doris Ka, Senior Paralegal (IP)

Internal Address: Cahill Gordon & Reindel LLP

Street Address: 80 Pine Street

City: New York

State: NY Zip: 10005

Phone Number: (212) 701-3569

Docket Number: Blucora (5732.1470)

Email Address: dka@cahill.com

6. Total number of applications and registrations involved:

25

7. Total fee (37 CFR 2.6(b)(6) & 3.41) \$

- Authorized to be charged to deposit account
- Enclosed

8. Payment Information:

Deposit Account Number _____

Authorized User Name _____

9. Signature:



Signature

May 6, 2019

Date

Doris Ka

Name of Person Signing

Total number of pages including cover sheet, attachments, and document:

10

Documents to be recorded (including cover sheet) should be faxed to (571) 273-0140, or mailed to:
Mail Stop Assignment Recordation Branch, Director of the USPTO, P.O. Box 1450, Alexandria, VA 22313-1450

**NOTICE OF SUCCESSION OF AGENCY
VOLUME/DOCUMENT 9934/090
REAL/FRAME 6065/0540**

This NOTICE OF SUCCESSION OF AGENCY (this “Notice”), dated as of May 6, 2019 (the “Effective Date”), is executed by Credit Suisse AG, Cayman Islands Branch, in its capacity as administrative agent and collateral agent under the Original Agreements (as defined below) (the “Prior Agent”), and JPMorgan Chase Bank, N.A., in its capacity as administrative agent and collateral agent under the Current Agreements (as defined below) (the “Successor Agent”).

WHEREAS, pursuant to that certain Credit Agreement, dated as of May 22, 2017, by and among Blucora, Inc., a Delaware corporation (the “Borrower”), the Prior Agent and certain other parties thereto, as amended by the First Amendment thereto, dated as of November 28, 2017 (as so amended, the “Original Credit Agreement”), the Prior Agent and certain grantor parties identified on the signature page hereto (the “Grantors”) entered into that certain Security Agreement, dated as of May 22, 2017 (the “Original Security Agreement”), that certain Copyright Security Agreement, dated as of May 22, 2017 (the “Copyright Security Agreement”) and that certain Trademark Security Agreement, dated as of May 22, 2017 (the “Trademark Security Agreement” and, together with the Original Credit Agreement, the Original Security Agreement and the Copyright Security Agreement, the “Original Agreements”), pursuant to which, in each case, the Grantors granted to the Prior Agent a security interest in and to certain collateral;

WHEREAS, the Copyright Security Agreement was recorded with the United States Copyright Office on May 23, 2017 at Volume/Document 9934/090, with respect to the copyrights identified on Schedule A attached hereto;

WHEREAS, the Trademark Security Agreement was recorded with the United States Patent and Trademark Office on May 22, 2017 at Reel/Frame 6065/0540, with respect to the trademarks identified on Schedule B attached hereto;

WHEREAS, the Original Credit Agreement was amended as of May 6, 2019 (as so amended, the “Current Credit Agreement” and, together with the Original Security Agreement, Copyright Security Agreement and Trademark Security Agreement, the “Current Agreements”), and in connection with the transactions under the Current Credit Agreement, the Prior Agent, the Successor Agent, the Borrower and certain other parties have entered into that certain Successor Agent Agreement, dated as of May 6, 2019 (the “Successor Agent Agreement”), whereby the Prior Agent resigned as administrative agent and collateral agent under the Current Agreements and is succeeded and replaced by the Successor Agent as successor administrative agent and collateral agent under the Current Agreements;

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree as follows:

1. Defined Terms. All capitalized terms used, but not otherwise defined herein, shall have the respective meanings ascribed in or otherwise referenced in the Successor Agent Agreement.

2. Succession and Replacement of Agency. Pursuant to the terms and conditions set forth in the Successor Agent Agreement, the Prior Agent has ceased to be the administrative agent and collateral agent under the Current Agreements and is succeeded and replaced by the Successor Agent as administrative agent and collateral agent under the Current Agreements. Nothing herein shall be deemed to terminate, interrupt or impair the continuity of the security interest in the collateral originally granted to the Prior Agent under the Original Security Agreement, Copyright Security Agreement and the

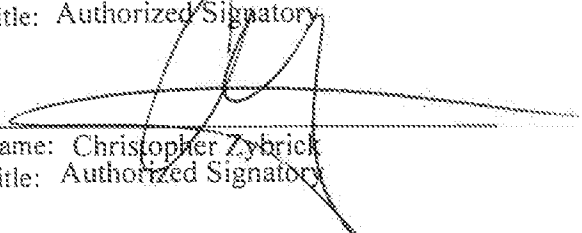
Trademark Security Agreement, including in the collateral identified on Schedules A and B attached hereto, which security interests are now succeeded by and transferred to the Successor Agent.

3. Governing Law; Jurisdiction; etc. The provisions of Sections 10.15 and 10.16 of the Current Credit Agreement shall apply to this Notice, mutatis mutandis.

IN WITNESS WHEREOF, the parties have executed this Notice effective as of the Effective
Date:

CREDIT SUISSE AG, CAYMAN ISLANDS
BRANCH, as Prior Agent

By: 
Name: Doreen Barr
Title: Authorized Signatory

By: 
Name: Christopher Zybrick
Title: Authorized Signatory

[Signature Page to Notice of Change in Agency]

**JPMORGAN CHASE BANK, N.A., as
Successor Agent**

By: Christine Lathrop
Name: Christine Lathrop
Title: Vice President

[Signature Page to Notice of Change in Agency]

Schedule A

COPYRIGHT REGISTRATIONS AND COPYRIGHT APPLICATIONS

GRANTOR/OWNER	TITLE OF WORK	COUNTRY	REG. NO.	ISSUE DATE
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	H.D. tax organizer. By H.D. Vest Financial Services.	United States	TXu000576641	05/26/1993
H.D. Vest, Inc.	The ABC's of educational funding.	United States	TX0002553043	04/18/1989
H.D. Vest, Inc.	Ethics.	United States	TX0002207213	09/11/1987
H.D. Vest, Inc.	Financial planning and the tax return.	United States	TX0002553041	04/18/1989
H.D. Vest, Inc.	H.D. Vest 1990 retirement plan guide.	United States	TX0002934107	08/28/1990
H.D. Vest, Inc.	H.D. Vest Investment Securities series 22 study materials.	United States	TX0002332406	06/20/1988
H.D. Vest, Inc.	H.D. Vest Financial Services S E P-I R A kit	United States	TX0002553047	04/18/1989
H.D. Vest, Inc.	Insurance handbook	United States	TX0002672894	04/18/1989
H.D. Vest, Inc.	Order processing kit: mutual funds, UITs, limited partnerships	United States	TX0002933188	09/17/1990
H.D. Vest, Inc.	Practice development kit	United States	TX0002553044	04/18/1989
H.D. Vest, Inc.	The Practitioner's I R A workbook	United States	TX0002545567	04/18/1989
H.D. Vest, Inc.	Public speaking and seminars/by Barbara Vest	United States	TX0002553042	04/18/1989
H.D. Vest, Inc.	Rep success program: financial planning and implementation	United States	TX0003027792	02/19/1991
H.D. Vest, Inc.	RepBook	United States	TX0002555141	04/18/1989
H.D. Vest, Inc.	RepBook	United States	TX0002194109	09/11/1987
H.D. Vest, Inc.	[Seminar kit]	United States	TX0002968089	09/18/1990
H.D. Vest, Inc.	Series 6 study guide.	United States	TX0002207212	09/11/1987
H.D. Vest, Inc.	The Tax and financial planning reception room & office: success by design.	United States	TX0002545568	04/18/1989
H.D. Vest, Inc.	Wealth: how to get it, how to keep it: the H.D. Vest system for achieving financial security / Herb D. Vest, Lynn R. Niedemeier.	United States	TX0003765459	01/04/1994
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	Achieving financial success.	United States	TXu000594583	09/03/2013

GRANTOR/OWNER	TITLE OF WORK	COUNTRY	REG. NO.	ISSUE DATE
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	Building your nest egg.	United States	TXu000594587	09/27/1993
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	H.D. Vest Financial Services: changing the way American families and businesses plan their financial futures.	United States	TXu000526489	09/03/2013
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	It's not what you earn, it's what you keep.	United States	TXu000531692	08/03/1992
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	National DataMax.	United States	TX0003458008	09/03/2013
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	Planning for their future.	United States	TXu000594581	09/03/2013
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	Wealth workout: H.D. Vest's wealth building program for life / H.D. Vest, Lynn R. Niedemeier.	United States	TX0004170685	12/08/1995
H.D. Vest, Inc. d/b/a H.D. Vest Financial Services	HD Vest guide to privatization: privatization achievability analysis	United States	TXu000525090	06/17/1992
H.D. Vest, Inc.	H.D. Vest Tax Organizer: Does your income work as hard as you do / by H.D. Vest Financial Services.	United States	TXu001373354	09/03/2013
H.D. Vest, Inc.	Achieving Financial Success / by H.D. Vest Financial Services.	United States	TXu001373353	09/03/2013
H.D. Vest, Inc.	Building Your Nestegg / by H.D. Vest Financial Services.	United States	TXu001373352	09/03/2013
H.D. Vest, Inc.	H.D. Vest Financial Services: "Changing the way American families and business plan their financial futures" / by H.D. Vest Financial Services.	United States	TXu001373355	09/03/2013
H.D. Vest, Inc.	National Datamax Free Demonstration Diskette Advertisement / by H.D. Vest Financial Services, Inc.	United States	TX0006484574	09/03/2013
H.D. Vest, Inc.	Planning for Their Future / by H.D. Vest Financial Services.	United States	TXu001373356	09/03/2013

GRANTOR/OWNER	TITLE OF WORK	COUNTRY	REG. NO.	ISSUE DATE
H.D. Vest, Inc.	Wealth Workout: H.D. Vest's Wealth Building Program for Life / by H.D. Vest Financial Services, employer for hire of Herb D. Vest and Lynn R. Niedemeier.	United States	TX0006484602	09/03/2013
H.D. Vest, Inc.	H.D. Vest Guide to Privatization: Privatization Achievability Analysis / by H.D. Vest Financial Services.	United States	TXu001373351	09/03/2013

Schedule B

TRADEMARK REGISTRATIONS AND TRADEMARK APPLICATIONS

Trademark Registrations:

GRANTOR/OWNER	MARK	COUNTRY	APP. NO.	REG. NO	FILE DATE	REG. DATE
Blucora, Inc.	BCOR ¹	Andorra	31044	36250	10/20/2016	10/20/2016
Blucora, Inc.	BLUCORA	United States	85/578791	4498626	03/23/2012	03/18/2014
Blucora, Inc.	BLUVEST	United States	87/295382	5351985	01/10/2017	12/05/2017
Blucora, Inc.	LEGALACT	United States	85738227	4790938	25-Sep-2012	11-Aug-2015
H.D. Vest, Inc.	8 WEALTH MANAGEMENT ISSUES	United States	77/429724	3671163	24-Mar-2008	18-Aug-2009
H.D. Vest, Inc.	HD VEST FINANCIAL SERVICES	United States	75/025932	2047321	30-Nov-1995	25-Mar-1997
H.D. Vest, Inc.	HDVLINK	United States	75/884012	2561056	30-Dec-1999	16-Apr-2002
H.D. Vest, Inc.	MANAGING AMERICA'S FUTURE	United States	75/914249	2431408	09-Feb-2000	27-Feb-2001
H.D. Vest, Inc.	VESTADVISOR	United States	75/883958	2415760	30-Dec-1999	26-Dec-2000
H.D. Vest, Inc.	VESTADVISOR SELECT	United States	85/556889	4393223	29-Feb-2012	27-Aug-2013
H.D. Vest, Inc.	VESTPREMIERE	United States	75/884475	2415762	30-Dec-1999	26-Dec-2000
H.D. Vest, Inc.	THE FINANCIAL SERVICES FIRM OF TAX PROFESSIONALS	United States	85/796937	4476961	06-Dec-2012	4-Feb-2014
H.D. Vest, Inc.	1040 ANALYST	United States	86/149491	4648020	20-Dec-2013	02-Dec-2014
H.D. Vest, Inc.	1040 ANALYST	United States	86/529660	5010645	10-Feb-2015	08/02/2016
H.D. Vest, Inc.	VESTSUCCESS	United States	86/314466	4758756	19-Jun-2014	23-Jun-2015
H.D. Vest, Inc.	VESTVISION	United States	86/239001	4725216	01-Apr-2014	21-Apr-2015
H.D. Vest, Inc.	V4 CLIENT EXPERIENCE	United States	86/416324	4868095	07-Oct-2014	8-Dec-2015
H.D. Vest, Inc.	REINVENT YOURSELF	United States	86/086189	4702224	08-Oct-2013	17-Mar-2015
H.D. Vest, Inc.	H.D. VEST ADVISORY SERVICES ²	State of Idaho, United States		17068		25-Oct-2001
H.D. Vest, Inc.	H.D. VEST ADVISORY SERVICES ³	State of Mississippi, United States		n/a		01-Sep-2001

¹ Not a U.S. federal registration or application and will not be recorded with the USPTO.

² Not a U.S. federal registration or application and will not be recorded with the USPTO.

GRANTOR/OWNER	MARK	COUNTRY	APP. NO.	REG. NO	FILE DATE	REG. DATE
H.D. Vest, Inc.	H.D. VEST ADVISORY SERVICES ⁴	State of North Dakota, United States		17287100		01-Sep-2006
H.D. Vest, Inc.	H.D. VEST INVESTMENT SERVICES ⁵	State of North Dakota, United States		17287200		01-Sep-2006
H.D. Vest, Inc.	H.D. VEST ADVISORY SERVICES ⁶	State of Ohio, United States		1651256		29-Sep-2006
H.D. Vest, Inc.	H.D. VEST ADVISORY SERVICES ⁷	State of Wyoming, United States		2001- 00426584		06-Nov-2001
TaxACT, Inc.	DONATION ASSISTANT	United States	77588355	3667993	08-Oct-2008	11-Aug-2009
TaxACT, Inc.	FEEL THE FREE	United States	85451696	4329023	20-Oct-2011	30-Apr-2013
TaxACT, Inc.	FREE TO PREPARE, FREE TO PRINT, FREE TO E-FILE	United States	77611947	3773717	11-Nov-2008	6-Apr-2010
TaxACT, Inc.	TAXACT	United States	75571666	2394116	14-Oct-1998	10-Oct-2000
TaxACT, Inc.	TAXACT	United States	78695721	3141614	18-Aug-2005	12-Sep-2006
TaxACT, Inc.	TAXACT ONLINE	United States	78695693	3138631	18-Aug-2005	5-Sep-2006
TaxACT, Inc.	YOU GOT THIS	United States	86715278	5187281	5-Aug-2015	04/18/2017
TaxACT, Inc.	TaxAct Logo	United States	86715287	5187282	5-Aug-2015	04/18/2017

³ Not a U.S. federal registration or application and will not be recorded with the USPTO.

⁴ Not a U.S. federal registration or application and will not be recorded with the USPTO.

⁵ Not a U.S. federal registration or application and will not be recorded with the USPTO.

⁶ Not a U.S. federal registration or application and will not be recorded with the USPTO.

⁷ Not a U.S. federal registration or application and will not be recorded with the USPTO.