

## TRADEMARK ASSIGNMENT COVER SHEET

Electronic Version v1.1  
Stylesheet Version v1.2

ETAS ID: TM764015

<b>SUBMISSION TYPE:</b>	NEW ASSIGNMENT		
<b>NATURE OF CONVEYANCE:</b>	ASSIGNMENT OF THE ENTIRE INTEREST AND THE GOODWILL		
<b>CONVEYING PARTY DATA</b>			
<b>Name</b>	<b>Formerly</b>	<b>Execution Date</b>	<b>Entity Type</b>
TaxSmart Research, LLC		10/27/2022	Limited Liability Company: DELAWARE
<b>RECEIVING PARTY DATA</b>			
<b>Name:</b>	AWM Data, LLC		
<b>Street Address:</b>	3200 Olympus Blvd		
<b>Internal Address:</b>	Suite 100		
<b>City:</b>	Dallas		
<b>State/Country:</b>	TEXAS		
<b>Postal Code:</b>	75019		
<b>Entity Type:</b>	Limited Liability Company: DELAWARE		
<b>PROPERTY NUMBERS Total: 4</b>			
<b>Property Type</b>	<b>Number</b>	<b>Word Mark</b>	
<b>Registration Number:</b>	6224011	CAPITAL GAINS ANALYZER	
<b>Registration Number:</b>	6343887	SOCIAL SECURITY PLANNER	
<b>Registration Number:</b>	6224012	TAX-LOSS HARVESTER	
<b>Registration Number:</b>	6183646	TSI TAX-SMART INVESTING	
<b>CORRESPONDENCE DATA</b>			
<b>Fax Number:</b>			
<i>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.</i>			
<b>Phone:</b>	817-878-3547		
<b>Email:</b>	cheryl.leb@kellyhart.com		
<b>Correspondent Name:</b>	Cheryl P. Leb		
<b>Address Line 1:</b>	201 Main Street, Suite 2500		
<b>Address Line 4:</b>	Fort Worth, TEXAS 76102		
<b>NAME OF SUBMITTER:</b>	Cheryl P. Leb		
<b>SIGNATURE:</b>	/Cheryl P. Leb/		
<b>DATE SIGNED:</b>	10/27/2022		
<b>Total Attachments: 4</b>			
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## INTELLECTUAL PROPERTY ASSIGNMENT

This INTELLECTUAL PROPERTY ASSIGNMENT ("**Assignment**"), dated effective as of October 27, 2022, is made by **TaxSmart Research, LLC**, a Delaware limited liability company ("**Assignor**"), with an address of 3200 Olympus Blvd, Suite 100, Dallas TX 75019, in favor of **AWM Data, LLC**, a Delaware limited liability company ("**Assignee**"), with an address of 3200 Olympus Blvd, Suite 100, Dallas TX 75019.

WHEREAS, Assignor is conveying, transferring, and assigning to Assignee and Assignee accepts certain intellectual property of Assignor as set forth herein, and Assignor is executing this IP Assignment to effect the assignment of and for recording with the United States Patent and Trademark Office, the United States Copyright Office, and any corresponding entities or agencies in any applicable jurisdictions.

NOW THEREFORE, the parties agree as follows:

1. Assignment. For good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Assignor hereby irrevocably conveys, transfers, and assigns to Assignee, and Assignee hereby accepts, all of Assignor's right, title, and interest in and to the following (the "**Assigned IP**"):

(a) the patents and patent applications set forth on Schedule 1 hereto and all issuances, divisions, continuations, continuations-in-part, reissues, extensions, reexaminations, and renewals thereof (the "**Patents**");

(b) the trademark registrations and applications set forth on Schedule 2 hereto and all issuances, extensions, and renewals thereof (the "**Trademarks**"), together with the goodwill of the business connected with the use of, and symbolized by, the Trademarks;

(c) any copyright rights in works registered or unregistered owned by Assignor and used for the operation of Assignor's business (the "**Copyrights**");

(d) all rights of any kind whatsoever of Assignor accruing under any of the foregoing provided by applicable law of any jurisdiction, by international treaties and conventions, and otherwise throughout the world;

(e) any and all royalties, fees, income, payments, and other proceeds now or hereafter due or payable with respect to any and all of the foregoing; and

(f) any and all claims and causes of action with respect to any of the foregoing, whether accruing before, on, or after the date hereof, including all rights to and claims for damages, restitution, and injunctive and other legal and equitable relief for past, present, and future infringement, dilution, misappropriation, violation, misuse, breach, or default, with the right but no obligation to sue for such legal and equitable relief and to collect, or otherwise recover, any such damages.

2. Recordation. Assignor hereby authorizes the Commissioner for Patents and the Commissioner for Trademarks in the United States Patent and Trademark Office, and the Register of Copyrights in the United States Copyright Office, and the officials of corresponding entities or agencies in any applicable jurisdictions to record and register this IP Assignment upon request by Assignee.

3. Counterparts. This IP Assignment may be executed in counterparts, each of which shall be deemed an original, but all of which together shall be deemed one and the same agreement. A signed copy of this IP Assignment delivered by facsimile, e-mail, or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original signed copy of this IP Assignment.

4. Successors and Assigns. This IP Assignment shall be binding upon and shall inure to the benefit of the parties hereto and their respective successors and assigns.

IN WITNESS WHEREOF, Assignor and Assignee have duly executed and delivered this IP Assignment as of the date first above written.

TAXSMART RESEARCH, LLC

DocuSigned by:  
By: Ann Bruder  
Name: Ann J. Bruder  
Title: Secretary


AWM DATA, LLC

DocuSigned by:  
By: Ann Bruder  
Name: Ann J. Bruder  
Title: Secretary

**SCHEDULE 1****ASSIGNED PATENTS AND PATENT APPLICATIONS**

Class	Title	Assignor	Serial Number	Country	Original Filing Date	Priority Date	Applicant Name	Issue Date	Patent No.
Design	Display Screen With Graphical User Interface - Tax Loss Harvester	Tax Smart Research, LLC	0517510479	United States	1/27/2020	1/27/2020	29/721,090	8/10/2021	D927,523
Design	Display Screen With Graphical User Interface - Capital Gains Analyzer	Tax Smart Research, LLC	0517510978	United States	1/27/2020	1/27/2020	29/722,091	8/10/2021	D927,524
Design	DISPLAY SCREEN WITH GRAPHICAL USER INTERFACE FOR A SOCIAL SECURITY PLANNER	Tax Smart Research, LLC	0532930325	United States	7/9/2020	7/9/2020	29/741,122	3/1/2022	D944833
Design	Display With Graphical User Interface - Social Security Planner V2	Tax Smart Research, LLC	0569950110	United States	1/22/2021	1/22/2021	29/767,463		

**SCHEDULE 2****ASSIGNED TRADEMARK REGISTRATIONS AND APPLICATIONS**

<b>MARK</b>	<b>TYPE</b>	<b>CLASS</b>	<b>REGISTRATION NUMBER AND DATE</b>
CAPITAL GAINS ANALYZER	Word Mark	42	RN 6224011 12/15/2020
SOCIAL SECURITY PLANNER	Word Mark	42	RN 6343887 5/4/2021
TAX-LOSS HARVESTER	Word Mark	42	RN 6224012 12/15/2020
TSI TAX-SMART INVESTING		42	RN 6183646 10/27/2020