

## TRADEMARK ASSIGNMENT COVER SHEET

Electronic Version v1.1  
Stylesheet Version v1.2

ETAS ID: TM862610

<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>
BOK Financial Corporation		12/19/2023	Corporation: OKLAHOMA
<b>RECEIVING PARTY DATA</b>			
<b>Name:</b>	BOK Financial Private Wealth, Inc.		
<b>Street Address:</b>	1600 Broadway, 4th Floor		
<b>City:</b>	Denver		
<b>State/Country:</b>	COLORADO		
<b>Postal Code:</b>	80202		
<b>Entity Type:</b>	Corporation: COLORADO		
<b>PROPERTY NUMBERS Total: 2</b>			
<b>Property Type</b>	<b>Number</b>	<b>Word Mark</b>	
<b>Registration Number:</b>	5546932	M THE MILESTONE GROUP	
<b>Registration Number:</b>	5536853	M THE MILESTONE GROUP WEALTH THROUGH DIS	
<b>CORRESPONDENCE DATA</b>			
<b>Fax Number:</b>	9185838251		
<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>	9185839922		
<b>Email:</b>	pmichlin@fdlaw.com		
<b>Correspondent Name:</b>	Frederic Dorwart, Lawyers PLLC		
<b>Address Line 1:</b>	124 East Fourth Street		
<b>Address Line 4:</b>	Tulsa, OKLAHOMA 74103		
<b>NAME OF SUBMITTER:</b>	Penina Michlin		
<b>SIGNATURE:</b>	/Penina Michlin/		
<b>DATE SIGNED:</b>	12/20/2023		
<b>Total Attachments: 4</b>			
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## TRADEMARK ASSIGNMENT

This TRADEMARK ASSIGNMENT ("*Trademark Assignment*"), dated as of December 19, 2023, is made by BOK Financial Corporation, an Oklahoma corporation having a place of business at Bank of Oklahoma Tower, P.O. Box 2300, Tulsa, OK 74192 ("*Assignor*"), in favor of BOK Financial Private Wealth, Inc., a Colorado corporation having a place of business at 1600 Braodway, 4<sup>th</sup> Floor, Denver, CO 80202 ("*Assignee*").

WHEREAS, Assignor is a non-operating holding company, and Assignee is a subsidiary of Assignor that currently uses the trademark registrations set forth on Schedule 1 attached hereto (the "*Assigned Trademarks*") under license from Assignor;

WHEREAS, Assignor desires to convey, transfer and assign to Assignee, and Assignee desires to receive, the Assigned Trademarks, and Assignor has agreed to execute and deliver this Trademark Assignment, for recording with the United States Patent and Trademark Office;

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 right, title, and interest in and to the following:

(a) the Assigned Trademarks and all issuances, extensions, and renewals thereof, together with the goodwill of the business connected with the use of, and symbolized by, the Assigned Trademarks;

(b) 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;

(c) 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

(d) 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 and Further Actions. Assignor hereby authorizes the Commissioner for Trademarks in the United States Patent and Trademark Office to record and register this Trademark Assignment upon request by Assignee. Following the date hereof, upon Assignee's reasonable request and at no cost to Assignee but at Assignee's expense, Assignor shall take such steps and actions, and provide such cooperation and assistance to Assignee and its successors, assigns, and legal representatives, including the execution and delivery of any affidavits, declarations, oaths, exhibits, assignments, powers of attorney, or other documents, as may be necessary to effect, evidence, or perfect the assignment of the Assigned Trademarks to Assignee, or any assignee or successor thereto.

3. Counterparts. This Trademark 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 Trademark 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 Trademark Assignment.

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

5. Governing Law. This Trademark Assignment and any claim, controversy, dispute, or cause of action (whether in contract, tort, or otherwise) based upon, arising out of, or relating to this Trademark Assignment and the transactions contemplated hereby shall be governed by, and construed in accordance with, the laws of the United States and the State of Oklahoma, without giving effect to any choice or conflict of law provision or rule (whether of the State of Oklahoma or any other jurisdiction).

[SIGNATURE PAGE FOLLOWS]

IN WITNESS WHEREOF, Assignor has duly executed and delivered this Trademark Assignment as of the date first written above.

BOK FINANCIAL CORPORATION

DocuSigned by:  
By Tamara Sloan  
B4DF523499A54B2...  
Name: Tamara Sloan  
Title: Secretary

Address for Notices: Bank of Oklahoma Tower  
P.O. Box 2300, Tulsa, OK 74192

AGREED TO AND ACCEPTED:

BOK FINANCIAL PRIVATE WEALTH, INC.

DocuSigned by:  
By Tamara Sloan  
B4DF523499A54B2...  
Name: Tamara Sloan  
Title: Secretary

Address for Notices: 1600 Broadway, 4th Floor,  
Denver, Colorado 80202

**SCHEDULE 1  
ASSIGNED TRADEMARKS**

Mark	Reg. No.	Services	Notes
 <p align="center"><b>THE MILESTONE GROUP</b></p>	5,546,932	Financial planning; Financial research; Financial services, namely, wealth management services; Investment advisory services; Investment consultation in Class 36.	Next Renewal due August 21, 2024
 <p align="center"><b>THE MILESTONE GROUP</b></p> <p align="center">Wealth Through Discipline.</p>	5,536,853	Financial planning; Financial research; Financial services, namely, wealth management services; Investment advisory services; Investment consultation in Class 36.	Next renewal due August 7, 2024