

## TRADEMARK ASSIGNMENT COVER SHEET

Electronic Version v1.1  
Stylesheet Version v1.2

ETAS ID: TM856958

<b>SUBMISSION TYPE:</b>	RESUBMISSION
<b>NATURE OF CONVEYANCE:</b>	MERGER AND CHANGE OF NAME
<b>EFFECTIVE DATE:</b>	11/01/2023
<b>RESUBMIT DOCUMENT ID:</b>	900811980

## CONVEYING PARTY DATA

Name	Formerly	Execution Date	Entity Type
Polaris Wealth Advisory Group, LLC		11/01/2023	Limited Liability Company:
Ropes Wealth Advisors LLC		11/01/2023	Limited Liability Company:

## NEWLY MERGED ENTITY DATA

Name	Execution Date	Entity Type
Adviser Investments, LLC	11/01/2023	Limited Liability Company:

## MERGED ENTITY'S NEW NAME (RECEIVING PARTY)

<b>Name:</b>	RWA Wealth Partners, LLC
<b>Street Address:</b>	85 Wells Avenue
<b>Internal Address:</b>	Suite 109
<b>City:</b>	Newton
<b>State/Country:</b>	MASSACHUSETTS
<b>Postal Code:</b>	02459
<b>Entity Type:</b>	Limited Liability Company: DELAWARE

## PROPERTY NUMBERS Total: 20

Property Type	Number	Word Mark
<b>Serial Number:</b>	97880612	ELIGENT
<b>Serial Number:</b>	97880615	INTELLENT
<b>Serial Number:</b>	97880618	SMARTFUL
<b>Serial Number:</b>	98085103	RWA WEALTH PARTNERS
<b>Serial Number:</b>	98085111	VALORA WEALTH PARTNERS
<b>Serial Number:</b>	98085113	RWA
<b>Serial Number:</b>	98149174	RWA WEALTH PARTNERS
<b>Registration Number:</b>	6626541	ADVISER CAPITAL
<b>Registration Number:</b>	6626003	
<b>Registration Number:</b>	6428698	THE PLANNER YOU CAN TALK TO
<b>Registration Number:</b>	5868244	THE ADVISER YOU CAN TALK TO

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Property Type	Number	Word Mark
Registration Number:	5942118	THE ADVISER YOU CAN TALK TO PODCAST
Registration Number:	5752184	ACTIVE ACUMEN
Registration Number:	5153044	BRAVER
Registration Number:	5153043	BRAVER
Registration Number:	3544656	AN INVESTMENT ADVISER YOU CAN TALK TO
Registration Number:	3479727	ADVISER INVESTMENTS
Registration Number:	3371954	BUY THE MANAGER, NOT THE FUND
Registration Number:	3179071	WHERE YOUR CONCERNS ARE AS IMPORTANT AS
Registration Number:	2956441	FORTUNE BUILDERS, NOT FORTUNE TELLERS

**CORRESPONDENCE DATA**

**Fax Number:** 3177133699

*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:** 3177139468

**Email:** taftipdocket@taftlaw.com

**Correspondent Name:** Gregory B. Coy

**Address Line 1:** Taft Stettinius & Hollister LLP

**Address Line 2:** One Indiana Square Suite 3500

**Address Line 4:** INDIANAPOLIS, INDIANA 46204

<b>ATTORNEY DOCKET NUMBER:</b>	ADI23-00023
<b>NAME OF SUBMITTER:</b>	Kelly Bowling
<b>SIGNATURE:</b>	/Kelly Bowling/
<b>DATE SIGNED:</b>	11/29/2023

**Total Attachments: 2**

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# Delaware

The First State

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I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY THE ATTACHED IS A TRUE AND CORRECT COPY OF THE CERTIFICATE OF MERGER, WHICH MERGES:

"ROPES WEALTH ADVISORS LLC", A DELAWARE LIMITED LIABILITY COMPANY,

"POLARIS WEALTH ADVISORY GROUP, LLC", A DELAWARE LIMITED LIABILITY COMPANY,

WITH AND INTO "ADVISER INVESTMENTS, LLC" UNDER THE NAME OF "RWA WEALTH PARTNERS, LLC", A LIMITED LIABILITY COMPANY ORGANIZED AND EXISTING UNDER THE LAWS OF THE STATE OF DELAWARE, AS RECEIVED AND FILED IN THIS OFFICE ON THE FIRST DAY OF NOVEMBER, A.D. 2023, AT 8:04 O`CLOCK A.M.



  
Jeffrey W. Bullock, Secretary of State

4915558 8100M  
SR# 20233863537

You may verify this certificate online at [corp.delaware.gov/authver.shtml](http://corp.delaware.gov/authver.shtml)

Authentication: 204492230  
Date: 11-01-23

**TRADEMARK**  
**REEL: 008271 FRAME: 0902**

# CERTIFICATE MERGER

MERGING

POLARIS WEALTH ADVISORY GROUP, LLC

AND

ROPES WEALTH ADVISORS LLC

WITH AND INTO

ADVISER INVESTMENTS, LLC

Pursuant to Title 6, Section 18-209 of the Delaware Limited Liability Company Act, the undersigned limited liability company executed the following Certificate of Merger:

1. The name of each constituent company is Polaris Wealth Advisory Group, LLC, a Delaware limited liability company, Ropes Wealth Advisors LLC, a Delaware limited liability company, and Adviser Investments, LLC, a Delaware limited liability company.

2. The Agreement of Merger respecting the merger (the "Agreement of Merger") has been approved and executed by each of the constituent companies.

3. The name of the surviving company is Adviser Investments, LLC, a Delaware limited liability company.

4. The Certificate of Formation of the surviving company, as in effect immediately prior to the effective time of the merger, shall be the Certificate of Formation of the surviving company; provided, however, that as of the effective time of the merger, such Certificate of Formation shall be amended to delete the text of Article I thereof and to replace it with the following text: "The name of the limited liability company is "RWA Wealth Partners, LLC" (the "LLC")."

5. The merger is to become effective upon the filing of this Certificate of Merger.

6. The Agreement of Merger is on file at 85 Wells Avenue, Suite 109, Newton, Massachusetts 02459, the place of business of the surviving company.

7. A copy of the Agreement of Merger will be furnished by the surviving company on request, without cost, to any member of the constituent companies.

IN WITNESS WHEREOF, the surviving company has caused this certificate to be signed by its authorized representative, on the 1<sup>st</sup> of November, 2023.

Adviser Investments, LLC

By: 

Printed: Mario Ramos

Title: Chief Executive Officer

State of Delaware

Secretary of State

Division of Corporations

Delivered 08:04 AM 11/01/2023

FILED 08:04 AM 11/01/2023

SR 20233863537 - File Number 4915558

RECORDED: 11/06/2023

TRADEMARK

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