



Dear Customer,

We are thrilled to welcome you to our trademark checklist. We want to emphasize the importance of understanding the trademark process. Therefore, we carefully crafted the below Trademark Checklist for you to regularly consult.

By following our checklist, you will see the Phases and actions that are generally taken to register a brand and establish it as a trusted and reliable entity in your industry.

To better understand this process and how to begin your own application, join our upcoming [Trademark Masterclass](#).

Best regards,

*Suzanna DeBarros*

**[Join Our Next Trademark Masterclass](#)**

# TRADEMARK CHECKLIST

## Phase 1: Ideation

Idea to Tangible

This is where you take your idea into or the Mark that exists to determine how you want to use, monetize, and leverage the mark long-term.

## Phase 2: Due Diligence

Trademark Research

Conduct a trademark search to determine whether your desired mark is available for use and registration. This also involves comprehensive due diligence research to ensure the application process will be as smooth as possible.

Good/Services

In this phase, your attorney will help you to consider the goods and/or services that you will be using the mark for to ensure that the mark is correctly classified inside your application.

Classes

Once you/your attorney determine the specific goods or services, they'll perform additional research with USPTO to determine the proper class for ID classification.

## Phase 3: Application

During this phase, you'll prepare and file your trademark application with the appropriate government agency.

Pre- Filing:

- Gathering Documents

- During this phase, you should gather documentary evidence (*i.e.* proof that you're using your mark) and start notating locations (virtual or not) where you've used your Mark. This will help the Attorney to begin preparing Your file for the application.

- Preparing the File

- The attorney will be downloading, and collecting the appropriate screenshots,

	<p>documents, or audio to begin prepping your file.</p> <ul style="list-style-type: none"> <li>● If there are outside agreements that are necessary for filing, be sure to include them.</li> <li>● If there are certain disclosures or consents, be sure to have them ready to get your</li> </ul>
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Filing the Application:	<ul style="list-style-type: none"> <li>● Initial Application Filed</li> <li>● Examining Attorney Assigned</li> </ul>
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# Join the Next Trademark Masterclass

**Here's What One Attendee Had to Say**

**Necci Headen Cooper**  
Top contributor · 1h · 🌐

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Good afternoon everyone that Trademark Masterclass was lit!! I learned so much today! Thank you Sivonna Debarros for taking the time to impart your expertise and wisdom. Also, thank you [Jaylen LaGrande](#) for introducing her to the group.

👍❤️
You and 3 others

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<b>Phase 4: Office Actions</b>	<p>During this phase, you or your attorney will Respond to any office actions or objections raised by the examining attorney. Below is an explanation of what those actions could be.</p>
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Substantive Office Action	<p>The most common substantive office action is a Likelihood of Confusion that exists with an existing registered mark. If you receive this objection, you/your team will need to perform the proper research (and if necessary) and try to obtain coexistence agreements to overcome this objection.</p>
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Non-Substantive Office Action	<p>These issues span from things like adding the owner's address or providing updated specimens that support the "proof of use" to name a few. Or as in one example for a client that wished to change the owner's name,</p>
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showing an Assignment of Interests of the Trademark.

### Phase 5: Published for Opposition

USPTO Gazette

If there are no Office Actions or we've overcome any objection on your behalf, USPTO will publish your mark in the Gazette for Opposition.

No Opposition

If no opposition to your Mark has been raised, your Mark will be registered.

### Phase 6: Registration

Notice & Certificate of Registration

Woohoo!!! Your Mark is Registered and You'll receive a Certificate of Registration.

### Phase 6: Enforcement - HERE'S WHAT YOU'LL NEED TO DO NEXT

NOTATE YOUR MAINTENANCE DATES

USE YOUR MARK AS REGISTERED

- You will then need to maintain your trademark registration by filing periodic renewals and submitting evidence of continued use.
- Your first maintenance date will be between the 5th & 6th Year

- It's time to start using the ® symbol on your logos and standard name.
- Make sure that you continue to use your Mark so that you don't lose protection.

MONITOR MARKS

LEGAL ACTION FOR INFRINGERS

- Monitor the marketplace for potential infringement of your trademark

- Take appropriate legal action against infringers to protect your rights and reputation.

**It's important to note that the trademark process can be complex and time-consuming, so it's always a good idea to work with a qualified**

**attorney who can guide you through the process and provide valuable advice and counsel.**

**We offer Short-Term & Annual Branding Legal Plans to help you maximize your Registered Mark, Crush Copycats, Protect Your Interests in Contracts and Beyond, and File New Marks.**

**Click the Button Below to Schedule Your Meeting**

**LEARN MORE**



**Not ready for Legal Representation? No Problem. Jump on the Next Trademark Masterclass.**

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