

PLRB Logo and Trademark Usage Policy

(October 2, 2017)

Purpose

Member participation in the Property & Liability Resource Bureau (PLRB) has made it the most respected insurance trade association in the industry. Consequently, the PLRB brand is a valuable asset of the member run association and that brand, which is represented by several PLRB trade names and logos, deserves protection.

The various PLRB trade names and logos are used to identify the source of products, the source of services, and affiliations. These trade names and logos are known in the trademark industry as trademarks, service marks, and collective membership marks. The purpose of this policy is to establish guidelines for the usage of those marks by the PLRB membership and others.

Usage and Licensing in General

PLRB marks may not be used by any person or organization without written license from PLRB. Written license for certain limited and specified uses is granted in this policy. For all other uses, express written license must be requested from and specifically granted by PLRB in order for the use to be permissible.

If you would like a license to use a PLRB mark, please contact Tom O'Dowd, PLRB's Marketing and Expos Manager, at todowd@plrb.org or 630-724-2224 for an application.

PLRB Trademarks

The Property & Liability resource Bureau has established and created several trademarks that identify the association, its products and services, its sponsorship, and its membership affiliations. PLRB trademarks, service marks, and collective membership marks presently include:

- PLRB (plain text)
- PLRB (logo)
- PLRB Affiliate Member
- PLRB Affiliate Member (logo B & W)
- PLRB Affiliate Member (logo color)



Usage and Licensing - by category

PLRB marks may not be used by any person or organization without written license from PLRB. Written license for certain limited and specified uses is granted in this policy to members of the PLRB. For all other uses, express written license must be requested from and specifically granted by PLRB in order for the use to be permissible. It is important to note that some uses are restricted solely to PLRB.

Usage of PLRB trademarks can be broken into three broad categories:

1. trademarks
2. service marks, and
3. collective membership marks.

The usage policy and guidelines for each of these categories is provided below.

1. Trademarks

The term *trademark* has two meanings: (1) a broad meaning and (2) a narrow meaning. When used broadly, it refers to the entire spectrum of marks including marks on products, service marks, collective membership marks, and certification marks. The narrow meaning of *trademark* refers to marks only on products. Here, we are referring to this narrow interpretation.

A trademark identifies and distinguishes the goods of one seller from goods manufactured or sold by others, and indicates the source of the goods. In short, a trademark is a brand name.

PLRB uses its trademarks to identify certain goods, mainly its publications and events, but also other miscellaneous goods such as pens, pencils, mugs, cups, shirts and hats.



A. Publications and Events

Use of the marks by others (any person or company other than PLRB) on publications and events is strictly prohibited. In other words, no one other than the PLRB is permitted to place a publication with a PLRB mark into commerce, such as a *PLRB Conference Bulletin*, or hold a PLRB event, such as a *PLRB Conference Dinner*.

However, it is a fair use to report about PLRB events in your publications and calendar of events or refer to such events on social media. It also may be a fair and acceptable use to refer to PLRB

events if you are holding an approved event in conjunction with a PLRB event. For example, ABC Company may contact the PLRB meeting staff for approval to hold a private reception following a PLRB seminar. Subject to PLRB staff approval, ABC company could promote their meeting with messages saying, for example, "you are invited to attend the ABC Company Tuesday Night Reception at this year's PLRB Claims Conference." However, any such publications must be submitted to PLRB meeting management staff in advance for review and approval prior to such promotion.

B. Shirts, Hats, Cups, Mugs, Pens, Pencils, etc.

Use of the marks by others (any person or company other than PLRB) on shirts, hats, cups, mugs, pens, pencils, etc. is prohibited unless express written license is requested from and specifically granted by PLRB. For example, an exhibitor without written signed license agreement from PLRB cannot distribute PLRB hats or mugs from its booth (e.g., a hat that says "PLRB Claims Conference 2010") at the PLRB Insurance Services Expo.

However, PLRB is amenable to granting license for such items to exhibitors and sponsors of PLRB events subject to PLRB review of the intended use and quantity. If you would like a license to use a PLRB mark for a conference or event handout or giveaway, please contact Tom O'Dowd, PLRB's Marketing and Expos Manager, at towdowd@plrb.org or 630-724-2224 for an application.

Also see the policy regarding Collective Membership Marks below.

2. Service Marks

The term *service mark* refers to a mark used in commerce to identify and distinguish the services of one provider from services provided by others, and to indicate the source of the services. PLRB uses its service marks to identify and distinguish its association services, business information services, trade show services, computer database services, information services, educational services, conference planning services, legal research and other legal services in the field of property and casualty adjusting.

Use of the marks by others (any person or company other than PLRB) in providing such services is strictly prohibited. In other words, no one other than the PLRB is permitted to use PLRB marks to indicate the source of such services.

Generally speaking, licenses are not granted to others to provide services of the PLRB.

3. Collective Membership Marks

The term *collective membership mark* refers to a mark used in commerce by the members of an association, or other collective group or organization, which indicates membership in the association, or

affiliation with the organization. The PLRB marks are collective membership marks. Note that the collective membership marks are adjectives and should be used accordingly (e.g., ABC Company is a PLRB Member; XYZ, LLP is a PLRB Affiliate Member.).

Note that the PLRB *collective membership marks* are not certification marks. A *certification mark* is a mark used in commerce, with the owner's permission, by someone other than its owner, to certify regional or other geographic origin, material, mode of manufacture, quality, accuracy, or other characteristics of someone's goods or services, or that the work or labor on the goods or services was performed by members of a union or other organization. When there is use of a PLRB mark as a collective membership mark or trademark, PLRB is not certifying the goods or services provided by the user. Furthermore, use of a PLRB mark as a collective membership mark is not an endorsement of the users products and services and it should never be represented as such.

Use of the collective membership marks by others (any person or company other than PLRB) is prohibited except as listed in this policy or as otherwise specifically licensed by PLRB. Discussion and examples of acceptable uses of the service marks are provided below.

A. PLRB Affiliate Members

Affiliate Members of the PLRB in good standing may use PLRB collective membership marks without further permission as described in this portion of the policy. Any other use will require written permission from the PLRB. PLRB members in good standing are those with all dues and fees paid in full.

PLRB Affiliate Members may indicate that their company or organization is a "PLRB Affiliate Member" on the following items:

- letterhead
- business cards
- website promoting services
- curricula vitae
- brochure promoting services
- an expo booth

PLRB Affiliate Members should remember that the marks, such as PLRB, in this type of usage are adjectives and must be used as adjectives. The usage of any of the marks must also include the phrase "affiliate member." For example, *Fictitious Adjusting Company* is a *PLRB Affiliate Member*. It would be improper for *Fictitious Adjusting Company* to put the PLRB/LIRB logo on their website without the accompanying phrase "Affiliate Member."

Furthermore, the usage of the PLRB mark cannot dominate the approved item. There should be no confusion that your company is providing products and services and not the PLRB. It should be clear that PLRB is not the company or brand. It should be clear that you are only indicating that you are an Affiliate Member of the PLRB.

B. PLRB Event Sponsors

Event sponsors of the PLRB in good standing may use PLRB collective membership marks without further permission as described in this portion of the policy. Any other use will require written permission from the PLRB. PLRB event sponsors in good standing are those with all dues and fees paid in full.

PLRB Event Sponsors may indicate that their company or organization is a PLRB Sponsor on the following items:

- letterhead
- business cards
- website promoting services
- curricula vitae
- brochure promoting services
- materials promoting the event
- an expo booth
- on social media

The representation should indicate the level of sponsorship where appropriate and must indicate the specific meeting and year (e.g. *Fictitious Adjusting Company is a PLRB Gold Sponsor of the 2010 Claims Conference.*) PLRB Affiliate Members should remember that the marks, such as PLRB, in this type of usage are adjectives and must be used as adjectives. It would be improper for *Fictitious Adjusting Company* to put the PLRB logo on their website without the accompanying phrase "*PLRB Gold Sponsor of the 2010 Claims Conference*" or an equivalent.

Furthermore, the usage of the PLRB mark cannot dominate the approved item. There should be no confusion that your company is providing products and services and not the PLRB. It should be clear that PLRB is not the company or brand. It should be clear that you are only indicating that you are a Sponsor of a PLRB event.

C. PLRB Presenter

PLRB Presenters may use PLRB collective membership marks without further permission as described in this portion of the policy. Any other use will require written permission from the PLRB. PLRB Presenters are those who have been officially selected by PLRB to present at an educational meeting, conference, webinar, or online module.

PLRB Presenters may indicate that they are a PLRB Presenter on the following items:

- letterhead

- business cards
- website promoting services
- curricula vitae
- brochure promoting services
- materials promoting the event
- an expo booth
- on social media

PLRB Presenters should remember that the marks, such as PLRB, in this type of usage are adjectives and must be used as adjectives. It would be improper for *Jane Smith* to put the PLRB logo on her firm's website without the accompanying phrase " *PLRB Presenter*" or an equivalent.

Furthermore, the usage of the PLRB mark cannot dominate the approved item. There should be no confusion that you and your company is providing products and services and not the PLRB. It should be clear that PLRB is not the company or brand. It should be clear that you are only indicating that you are or were a Presenter at a PLRB event.

D. Exhibitor

PLRB Exhibitors in good standing may use PLRB collective membership marks (not the affiliate member mark unless the exhibitor is an affiliate member in good standing) without further permission as described in this portion of the policy. Any other use will require written permission from the PLRB. PLRB Exhibitors in good standing are those with all dues and fees paid in full for the current year.

PLRB Exhibitors may indicate that their company or organization is a PLRB Exhibitor on the following items:

- letterhead
- business cards
- website promoting services
- curricula vitae
- brochure promoting services
- materials promoting the event
- an expo booth

The representation must indicate the specific meeting and year (e.g., *Fictitious Adjusting Company* will be an Exhibitor at the *PLRB 2010 Claims Conference*.) PLRB Affiliate Members should remember that the marks, such as PLRB, in this type of usage are adjectives and must be used as adjectives. It would be improper for *Fictitious Adjusting Company* to put the PLRB logo on their website without the accompanying phrase "*Exhibitor at the PLRB 2010 Claims Conference*" or an equivalent.

Furthermore, the usage of the PLRB mark cannot dominate the approved item. There should be no confusion that your company is providing products and services and not the PLRB. It should be clear that PLRB is not the company or brand. It should be clear that you are only indicating that you are an Exhibitor at the PLRB event.

If you would like a license to use a PLRB mark in a manner other than indicated above, please contact Tom O'Dowd, PLRB's Marketing and Expos Manager, at towdowd@plrb.org or 630-724-2224 for an application.

Note that this policy is subject to change at the sole discretion of PLRB. PLRB has the right to require any users claiming acceptable use under the above described permissible uses to stop using the mark. Any users of the marks agree that permission can be withdrawn by PLRB at any time and the user assumes all risks of consequential damages and costs related to removal of the marks from items or publications.

Questions

If you have any questions about this policy, please contact Tom O'Dowd, PLRB's Marketing and Expos Manager, at todowd@plrb.org or 630-724-2224.