
Rationale for Trademark Policies and Procedures

- 1.1 The following “Trademark Policies and Procedures” have been adopted to protect the use and integrity of the training and practice of Ortho-Bionomy. The Society has completed the process of registering the term “Ortho-Bionomy®”, the Sand Dollar logo, and the collective membership term “Society of Ortho-Bionomy International®” with the United States Patent and Trademark Office to ensure that Ortho-Bionomy is represented in ways that are appropriate.
- 1.2 A trademark is a word, name, symbol, design or any combination of them that a business or organization uses to identify its goods or services and uses to distinguish its goods and services from those of others. Many trademark owners use a “TM” symbol with their mark to claim rights to it. After a trademark is registered with the federal government, the owner of the trademark is entitled to use the “®” symbol to identify its trademark.
- 1.3 Trademarks are symbols of quality. These “Trademark Policies and Procedures” establish standards of training for those who can use the term and the Society’s other marks. In crafting this document the Society is protecting the ability of individuals to practice and instructors to teach Ortho-Bionomy by assuring the public of the competency of the Society’s members who provide Ortho-Bionomy services.
- 1.4 The Trademarks that the Society has registered are the sole property of the Society and it is the Society’s responsibility to monitor and regulate their use. Once an organization has a trademark registered, it needs to be diligent in protecting its trademark rights. If an organization ignores inappropriate usage, it runs the risk of losing its trademark rights.
- 1.5 The following “Trademark Policies and Procedures” constitute the legal license granted to members of the Society to enable them to use these marks. The Society’s lawyers have guided the Board of Directors in constructing a legal license that uses the correct legal language necessary to protect the Society’s marks. Our lawyers have assured us the the following “Trademark Policies and Procedures” and the way that it is stated is the best way of protecting these trademarks.
- 1.6 The “Trademark Policies and Procedures” clearly states how members may use the Society’s Registered Trademarks. If an individual chooses to no longer be a member of the Society, they also can no longer use the trademarks for which they qualified. Their legal license to use these marks is ended. (Individuals, however, may renew their membership and, upon completion of any training requirements, have their trademark privileges reinstated).
- 1.7 By stating clearly who may use the Society’s Registered Trademarks we will be able to respond directly to situations where these marks may be used inappropriately or illegally. Members who use the trademarks in any way other than as outlined in the policy or any individual who use these trademarks and are not members of the Society are in violation of federal trademark law.

- 1.8 If you have any questions about the trademark regulations, please feel free to contact the Society office and we will assist you with compliance with these policies.

2.0 Appropriate Presentation of the Trademarks

- 2.1 In common usage the “®” must appear the first time the term “Ortho-Bionomy” or “Society of Ortho-Bionomy International®” is used in a document, brochure, or class outline. After its initial use in the document, you should NOT use the “®” for any of the subsequent appearances of these trademarks. The “®” must appear superscripted after the term.

3.0 Introduction to Trademark Policies and Procedures

- 3.1 The Society of Ortho-Bionomy International, Inc. (the “Society”) owns three registered trademarks:
- 3.1.1 Ortho-Bionomy®
 - 3.1.2 Society of Ortho-Bionomy International®
 - 3.1.3 Sand Dollar design.
- 3.2 The Society encourages its members to promote their individual Ortho-Bionomy practices in ways that maintain the integrity and the reputation of the Society’s programs and services. As a member of the Society, you may use the Society’s trademarks to promote your bodywork services if you follow these policies and procedures.
- 3.3 Only members may use these trademarks to promote or sell services similar to the services of the Society. The Society encourages members to report the improper use of the Society’s trademarks.

4.0 Use of Society trademarks in members’ promotional literature.

- 4.1 Members of the Society may use the Society’s trademarks in promotional literature in various ways, depending on their membership status.
- 4.1.1 **Student Members:** Member who has not completed requirements for Associate Membership may not use the Society’s trademarks.

4.1.2 Associate (formerly General) Members

- 4.1.2.1 Associate Training Segment of the Practitioner Training Program Includes completion of 114 units of Ortho-Bionomy instruction (which also counts toward the Practitioner Training Program (PTP) consisting of:
 - 4.1.2.1.1 32 units of Basics/Phase Four
 - 4.1.2.1.2 16 units of Phase Five
 - 4.1.2.1.3 16 units of Phase Six
 - 4.1.2.1.4 3, 8, 16 Units of Ethics see below for options:
 - 4.1.2.1.4.1 Tutorial: 3-hour Ethics Tutorial with Ortho-Bionomy Instructor
 - 4.1.2.1.4.2 Ethics and Emotions class – 8- or 16-unit Ortho-Bionomy Ethics class
 - 4.1.2.1.5 Completed Electives to add up to 114 total units completed
- 4.1.2.2 The Associate units transfer directly to the Practitioner Training Program (PTP)
- 4.1.2.3 1 session – Receive a session from a Registered Practitioner or Advanced Practitioner, or any level of Instructor (counts in the PTP)
- 4.1.2.4 1 session - Give a session for feedback to an Instructor (counts in the PTP)
- 4.1.2.5 Paid Membership fee
- 4.1.2.6 Sent completed form to SOBI office
- 4.1.2.7 Become an Associate once SOBI office notifies trainee of receipt and approval
- 4.1.2.8 As a Associate Member, you may state that you are a member of Society of Ortho-Bionomy International®. Also, as an Associate Member, you may use the term Ortho-Bionomy in your promotional literature by listing Ortho-Bionomy among the bodywork modalities that you practice. However, Associate Members may not use the Society’s trademarks in any way that suggest that the member specializes in, or exclusively practices, Ortho-Bionomy®. Associate Members may not use the Society’s trademarks in any way that suggests that the member has completed the Society’s Registered Practitioner Training Program. Therefore, as a Associate Member, you may not use the words “registered”, “practitioner”, or “instructor” in conjunction

with the term Ortho-Bionomy®. Associate Members may NOT use the Sand Dollar trademark.

- 4.1.3 **Professional Members:** The two classes of Professional Membership of the Society are Practitioner and Instructor Members. Practitioner Members must complete the Registered Practitioner Training Program and have current paid memberships to the society. Instructor Members must complete additional instructor training and apprenticeship and have current paid memberships in the Society. In order to maintain membership in good standing, Practitioner members must complete 16 units of continuing education every two years. Instructor members must complete 16 units of continuing education that involves co-teaching or being observed teaching every two years.
- 4.1.3.1 Practitioner Members may use the phrase “Registered Practitioner of Ortho-Bionomy®” in promotional literature. Instructor members may use the phrase “Registered Instructor of Ortho-Bionomy®”.
- 4.1.3.2 Professional Members may also use the Sand Dollar trademark in the promotion of their Ortho-Bionomy practices. However, the Sand Dollar trademark may not be used as a personal logo of any member. The Sand Dollar trademark may be used in any size, but it may not be modified in any other way. Examples of unacceptable modifications include the superimposition of type over the mark or the reproduction of only a portion of the Sand Dollar mark.
- 4.1.3.3 Professional Members, like Associate Members, may state that they are members of the Society of Ortho-Bionomy International®, and they may use the term “Ortho-Bionomy®” in their promotional literature.

5.0 Required statement of ownership and registration.

- 5.1 In order to alert others to the legal status of the Society’s trademarks, all members must provide notice of the Society’s ownership and registration when using one of the Society’s trademarks. The Society’s trademarks must always include the symbol “®” which indicates that the mark is federally registered. You must also include a statement of registration and ownership, in one of the following forms or combinations, depending on which trademark you use:

- 5.1.1 Ortho-Bionomy is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.
- 5.1.2 The Sand Dollar design is a registered trademark of the Society of Ortho-Bionomy International, Inc. and is used with permission.

- 5.1.3 Ortho-Bionomy and the Sand Dollar design are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.
- 5.1.4 Ortho Bionomy®, the Sand Dollar design, and Society of Ortho-Bionomy International® are registered trademarks of the Society of Ortho-Bionomy International, Inc. and are used with permission.
- 5.2 You should place the statement of registration and ownership in a conspicuous position near the trademark, such as the bottom of the page on which the trademark first appears, or on the first page of the document. In a brochure, you may place the statement of registration and ownership in the body of the brochure.
- 5.3 You may use Ortho-Bionomy on business cards without a statement of registration and ownership, although you must always use the symbol “®”.

6.0 Uses of Society trademarks requiring licensing agreements.

- 6.1 The Society must approve, in writing, any use of the Society’s trademarks other than those listed above. Uses requiring authorization include instructional materials, video or audio tapes, merchandise such as T-shirts, buttons and pins and any other use not listed above.
- 6.2 In order to ensure that Ortho-Bionomy training meets the standards of the Society, instructors must submit their instructional materials to the Society for review and approval. The Society will retain a copy of all course outlines.
- 6.3 If you would like authorization to use the Society’s trademarks in one of these ways, you should submit an application to the Society. The application must include:
- 6.4 A description of the item to which the Society trademark(s) will be affixed and if available, samples of the item.
- 6.5 Information about the production of the item, including the name of the producer, publisher, or manufacturer, a description of the quality controls to be used by the producer, the number of pieces to be produced, and an estimate of the production costs and the retail price of the final product.
- 6.6 Information about the distribution and marketing of the item, including the potential customers and audience for the item, and the proposed promotion, sales and marketing of the item.
- 6.7 The time period to be covered by the potential agreement with the Society.
- 6.8 If the Society’s Board of Directors approves your application, the Board will draft a licensing agreement to be signed by the applicant and a Board representative.