

PATENT ASSIGNMENT COVER SHEET

Electronic Version v1.1
Stylesheet Version v1.2

EPAS ID: PAT4067893

SUBMISSION TYPE:	NEW ASSIGNMENT
NATURE OF CONVEYANCE:	ASSIGNMENT
CONVEYING PARTY DATA	
Name	Execution Date
ZACHARY A. GIPSON	08/22/2016
ERIC M. ENGQUIST	09/26/2016
MELISA IZAGUIRRE	08/18/2016
RON'DELL HARLEY	09/13/2016
LEA B. SIMS	08/18/2016
JACKIE L. GILMORE	08/29/2016
TIM HAVERLY	08/19/2016
BRIAN F. WILSON	09/02/2016
RECEIVING PARTY DATA	
Name:	UIPCO, LLC
Street Address:	9800 FREDERICKSBURG ROAD
City:	SAN ANTONIO
State/Country:	TEXAS
Postal Code:	78288
PROPERTY NUMBERS Total: 1	
Property Type	Number
Application Number:	15273952
CORRESPONDENCE DATA	
Fax Number:	(206)359-7198
<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>	
Phone:	303-291-2300
Email:	rlopez@perkinscoie.com
Correspondent Name:	ROXANN LOPEZ
Address Line 1:	PERKINS COIE LLP
Address Line 2:	P.O. BOX 1247
Address Line 4:	SEATTLE, WASHINGTON 98111-1247
ATTORNEY DOCKET NUMBER:	US-1157.01 9142-8145.US01
NAME OF SUBMITTER:	ROXANN LOPEZ
SIGNATURE:	/Roxann Lopez/

PATENT

DATE SIGNED:	09/26/2016
---------------------	------------

Total Attachments: 24
source=ExecutedAssignment#page1.tif
source=ExecutedAssignment#page2.tif
source=ExecutedAssignment#page3.tif
source=ExecutedAssignment#page4.tif
source=ExecutedAssignment#page5.tif
source=ExecutedAssignment#page6.tif
source=ExecutedAssignment#page7.tif
source=ExecutedAssignment#page8.tif
source=ExecutedAssignment#page9.tif
source=ExecutedAssignment#page10.tif
source=ExecutedAssignment#page11.tif
source=ExecutedAssignment#page12.tif
source=ExecutedAssignment#page13.tif
source=ExecutedAssignment#page14.tif
source=ExecutedAssignment#page15.tif
source=ExecutedAssignment#page16.tif
source=ExecutedAssignment#page17.tif
source=ExecutedAssignment#page18.tif
source=ExecutedAssignment#page19.tif
source=ExecutedAssignment#page20.tif
source=ExecutedAssignment#page21.tif
source=ExecutedAssignment#page22.tif
source=ExecutedAssignment#page23.tif
source=ExecutedAssignment#page24.tif

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s) GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek *106 Wellesley Landing*
San Antonio, TX 78258 *Shavano Park, TX 78231*

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
~~6215 Via La Carrera, #488~~ *10050 Axis Dr*
San Antonio, TX ~~78256~~ *Boerne, Tx 78006*

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:
UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 2 of 4

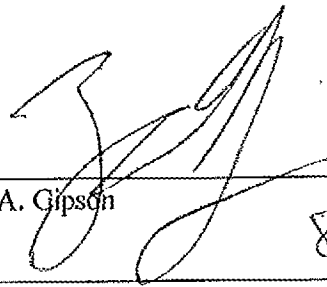
132408349.1

PATENT
REEL: 040144 FRAME: 0830

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.

This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.



Zachary A. Gipsón
8/22/16

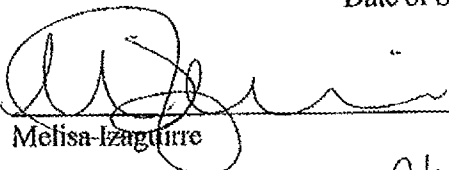
Date of Signature

Eric M. Engquist

Date of Signature

Richard Martinez

Date of Signature



Melissa Izaguirre
8/18/16

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0831

Ron'Dell Harley

Date of Signature

Lea B. Sims

Lea B. Sims

8/18/14

Date of Signature

Jackie L. Gilmore

Date of Signature

Tim Haverly

Date of Signature

Brian F. Wilson

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0832

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s)GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek
San Antonio, TX 78258

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
6215 Via La Cantera, #488
San Antonio, TX 78256

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:

UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 1 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0833

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02

Page 2 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0834

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.


This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.

Zachary A. Gipson

Date of Signature


Eric M. Engquist



Date of Signature

Richard Martinez

Date of Signature

Melisa Izaguirre

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0835

Ron'Dell Harley

Date of Signature

Lea B. Sims

Date of Signature

Jackie L. Gilmore

Date of Signature

Tim Haverly

Date of Signature

Brian F. Wilson

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0836

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s) GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek
San Antonio, TX 78258

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
6215 Via La Cantera, #488
San Antonio, TX 78256

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:
UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 1 of 4

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 2 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0838

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.

This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.

Zachary A. Gipson

Date of Signature

Eric M. Engquist

Date of Signature

Richard Martinez

Date of Signature

Melisa Izaguirre

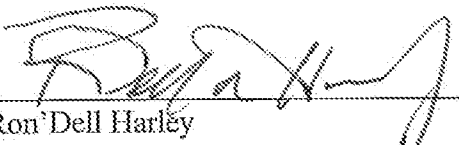
Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0839



Ron Dell Harley

13 SEP 2016

Date of Signature

Lea B. Sims

Date of Signature

Jackie L. Gilmore

Date of Signature

Tim Haverly

Date of Signature

Brian F. Wilson

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s) GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek
San Antonio, TX 78258

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
6215 Via La Cantera, #488
San Antonio, TX 78256

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:

UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL: Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 1 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0841

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 2 of 4

133468349.1

PATENT
REEL: 040144 FRAME: 0842

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.

This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.

Zachary A. Gipson

Date of Signature

Eric M. Engquist

Date of Signature

Richard Martinez

Date of Signature

Melisa Izaguirre

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0843

Ron'Dell Harley

Date of Signature

Lea B. Sims

Date of Signature

Jackie L. Gilmore

Jackie L. Gilmore

08-29-2016

Date of Signature

Tim Haverly

Date of Signature

Brian F. Wilson

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

132408349.1

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s)GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek
San Antonio, TX 78258

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
6215 Via La Cantera, #488
San Antonio, TX 78256

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:

UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 1 of 1

132408349.1

PATENT
REEL: 040144 FRAME: 0845

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 2 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0846

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.

This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.

Zachary A. Gipson

Date of Signature

Eric M. Engquist

Date of Signature

Richard Martinez

Date of Signature

Melisa Izaguirre

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0847

Ron'Dell Harley

Date of Signature

Lea B. Sims

Date of Signature

Jackie L. Gilmore

Date of Signature



Tim Haverly

08/19/2016

Date of Signature

Brian F. Wilson

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0848

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Inventor(s)GIPSON, Zachary A.; ENGQUIST, Eric M.; MARTINEZ, Richard; IZAGUIRRE, Melisa;
HARLEY, Ron'Dell; SIMS, Lea B.; GILMORE, Jackie L.; HAVERLY, Tim; WILSON, Brian F.
ApplicantUIPCO, LLC
UIPCO, LLC's Docket No.US-1157.01
Title: SYSTEMS AND METHODS FOR RETIREMENT PLANNING

ASSIGNMENT

PARTIES TO THE ASSIGNMENT

Assignor(s):

Zachary A. Gipson
3618 Ivory Creek
San Antonio, TX 78258

Lea B. Sims
3039 Fall Valley Drive
San Antonio, TX 78247

Eric M. Engquist
1515 Redcloud Peak
Canyon Lake, TX 78133

Jackie L. Gilmore
2746 Morning Star
New Braunfels, TX 78132

Richard Martinez
5635 Timber Rain
San Antonio, TX 78250

Tim Haverly
3993 Fishers Hill
San Antonio, TX 78240

Melisa Izaguirre
6215 Via La Cantera, #488
San Antonio, TX 78256

Brian F. Wilson
6515 Rambling Trail Dr.
San Antonio, TX 78240

Ron'Dell Harley
25639 Coronado Bluff
San Antonio, TX 78260

Assignee:

UIPCO, LLC
9800 Fredericksburg Road
San Antonio, Texas 78288

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 1 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0849

ASSIGNMENT AGREEMENT

WHEREAS, ASSIGNOR(S) (listed above) is/are inventor(s) of an invention(s) entitled as described and claimed in the specification forming part of an application(s) for United States letters patent referenced above;

WHEREAS, UIPCO, a Texas limited liability company (hereinafter referred to as ASSIGNEE), having a place of business at 9800 Fredericksburg Road, San Antonio, Texas 78288, is desirous of acquiring the entire right, title and interest in and to the invention(s) and in and to any letters patent that may be granted therefore in the United States and in any and all foreign countries;

NOW, THEREFORE, in exchange for good and valuable consideration, the receipt of which is hereby acknowledged, ASSIGNOR(S) hereby sell, assign, and transfer unto ASSIGNEE, the entire right, title, and interest in and to the invention(s) (including the invention(s) disclosed in the application referenced above), the application(s), and any and all letters patent which may be granted for the invention(s) in the United States of America and its territorial possessions and in any and all foreign countries, and in any and all divisions, reissues, and continuations thereof, as well as any application(s) to which the application referenced above claims priority, including the right to file foreign applications directly in the name of ASSIGNEE and to claim priority rights deriving from said United States application(s) to which said foreign applications are entitled by virtue of international convention, treaty, or otherwise, said invention(s), application(s), and all letters patent on said invention(s) to be held and enjoyed by ASSIGNEE and its successors and assigns for their use and benefit and of their successors and assigns as fully and entirely as the same would have been held and enjoyed by ASSIGNOR(S) had this assignment, transfer, and sale not been made. ASSIGNOR(S) hereby authorize(s) and request(s) the Commissioner of Patents and Trademarks to issue all letters patent on said invention to ASSIGNEE. ASSIGNOR(S) agree(s) to execute all instruments and documents required for the making and prosecution of applications for United States and foreign letters patent on said invention(s), for litigation regarding said letters patent, or for the purpose of protecting title to said invention(s) or letters patent therefore, all of the above hereinafter the "Assigned Patent Rights."

For the avoidance of doubt, ASSIGNOR(S) hereby irrevocably assign(s), transfer(s), convey(s), and deliver(s) to ASSIGNEE all rights to sue or to bring any action or to assert any claim, whether at law or in equity, against any person or entity relating to any of the Assigned Patent Rights, including without limitation for past, present, or future infringement, misappropriation, or other unauthorized use of any of the Assigned Patent Rights, to obtain injunctive relief, and to recover or collect royalties, damages, and profits, including without limitation for such past, present or future infringement, misappropriation, or unauthorized use of any of the Assigned Patent Rights. By specifically enumerating certain rights of enforcement in this paragraph, the ASSIGNOR(S) and ASSIGNEE do not intend for this paragraph to be interpreted to suggest any limitation upon the scope of rights transferred by virtue of this Assignment.

The ASSIGNOR(S) further agree(s) for myself and my or ourselves and our respective heirs, legal representatives, and assigns to provide to the ASSIGNEE promptly upon its request and at its expense all pertinent facts and documents relating to any of said inventions, applications, or patents and legal equivalents as may be known and accessible to us and to testify as to the same in any interference, litigation, or proceeding relating thereto.

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 2 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0850

ASSIGNOR(S) further hereby represent(s) and warrant(s) that ASSIGNOR(S) is/are an original contributor to the material included in the application; and ASSIGNOR(S) has/have reviewed and understand(s) the contents of this Assignment Agreement.

This Assignment is governed by and shall be construed in accordance with the laws of Texas.

FINALLY, this Assignment may be executed in multiple counterparts, each of which shall be deemed to be an original of this Assignment. Additionally, we hereby authorize our attorneys to collect the signature pages of each executed counterpart and to attach those signature pages to a single copy of this instrument, which single copy and attached signature pages together shall constitute an original of this Assignment.

Zachary A. Gipson

Date of Signature

Eric M. Engquist

Date of Signature

Richard Martinez

Date of Signature

Melisa Izaguirre

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 3 of 4

132408349.1

PATENT
REEL: 040144 FRAME: 0851

Ron'Deill Harley

Date of Signature

Lea B. Sims

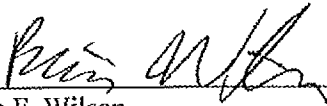
Date of Signature

Jackie L. Gilmore

Date of Signature

Tim Haverly

Date of Signature



Brian F. Wilson

9-2-16

Date of Signature

CONFIDENTIAL. Attorney-Client Privileged Communication. All Legal Privileges Claimed Including
Attorney Work Product. Not for Distribution.

Ver. 2.02
Page 4 of 4

132408349.1