

PATENT ASSIGNMENT COVER SHEET

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EPAS ID: PAT8047394

SUBMISSION TYPE:	NEW ASSIGNMENT
NATURE OF CONVEYANCE:	ASSIGNMENT
CONVEYING PARTY DATA	
Name	Execution Date
INVESTEDGE, INC.	04/20/2023
RECEIVING PARTY DATA	
Name:	FIRST RATE, INC.
Street Address:	1903 ASCENSION BLVD
City:	ARLINGTON
State/Country:	TEXAS
Postal Code:	76006
PROPERTY NUMBERS Total: 8	
Property Type	Number
Patent Number:	7587350
Patent Number:	8346645
Patent Number:	8595110
Patent Number:	9805421
Patent Number:	7565394
Patent Number:	7917575
Patent Number:	8078666
Patent Number:	9542659
CORRESPONDENCE DATA	
Fax Number:	(615)252-4707
<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:	6152524639
Email:	jneu@bradley.com
Correspondent Name:	JACOB W NEU
Address Line 1:	1600 DIVISION STREET
Address Line 2:	SUITE 700
Address Line 4:	NASHVILLE, TENNESSEE 37203
ATTORNEY DOCKET NUMBER:	213890-401040
NAME OF SUBMITTER:	JACOB W NEU
SIGNATURE:	/jacobwneu/

PATENT

DATE SIGNED:	07/10/2023
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Total Attachments: 5

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PATENT ASSIGNMENT

THIS PATENT ASSIGNMENT (“Assignment”) is made and entered into as of April 20, 2023, by and between **InvestEdge, Inc.**, a Delaware corporation (“Assignor”) with a principal place of business at 2400 Ansys Drive, Suite 200, Canonsburg, PA 15317, and **First Rate, Inc.**, a Texas corporation (“Assignee”) with a principal place of business at 1903 Ascension Blvd., Arlington, TX 76006 (each a “Party” and collectively, the “Parties”).

WHEREAS, Assignor and Assignee are parties to that certain Asset Purchase Agreement, dated as of January 20, 2023, by and between Assignor and Assignee (the “Purchase Agreement”), pursuant to which, among other things, Assignor agreed to sell, convey, assign and transfer all of Assignor’s right, title and interest in and to the patents listed on Schedule A (collectively the “Patents”); and

WHEREAS, Assignor and Assignee are entering into this Agreement to evidence the sale, conveyance, assignment and transfer of the Patents, in accordance with the terms of the Purchase Agreement.

NOW, THEREFORE, for good and valuable consideration, the receipt and adequacy of which are acknowledged, the Parties hereby agree as set forth below.

1. Assignment. Subject to the terms, conditions and limitations set forth in the Purchase Agreement, Assignor hereby sells, assigns, transfers and conveys to Assignee, its successors, legal representatives, and assigns, its entire right, title and interest in, to and under the Patents, and all divisional, renewal, substitutional, and continuing applications thereof; and all Letters Patent of the United States of America which may be granted thereon and all reissues and extensions thereof, and all applications for Letters Patent which may be filed for the Patents in any country or countries foreign to the United States of America, including all rights of priority, all rights to publish cautionary notices reserving ownership of the Patents, all rights to register the Patents in appropriate registries, and all Letters Patent which may be granted for the Patents in any country or countries foreign to the United States of America and all extensions; renewals and reissues thereof.

2. Recordation; Further Actions. Assignor hereby authorizes and requests the Commissioner of Patents and Trademarks of the United States of America, and any official of any country or countries foreign to the United States of America, whose duty it is to issue patents on applications as aforesaid, to issue all Letters Patent for the Patents to the Assignee, its successors, legal representatives and assigns, in accordance with the terms of this Assignment. Each Party hereto shall execute and deliver such other certificates, agreements, conveyances and other documents, and shall take such other action, as may be reasonably requested by the other Party in order to complete the sale, conveyance, assignment and transfer to Assignee of all the right, title and interest of Assignor in and to the Patents hereby sold, conveyed, assigned or transferred.

3. Counterparts. This Assignment may be executed by the Parties hereto in separate counterparts, each of which when so executed and delivered shall be an original, but all such counterparts taken together shall constitute one and the same instrument. Each counterpart may be delivered by electronic transmission, which transmission shall be deemed delivery of an originally executed document.

4. Successors and Assigns. This Assignment will be binding upon Assignor and its successors and assigns and will inure to the benefit of Assignee and its successors and assigns.

5. Applicable Law. This Assignment and any claim, controversy, dispute, or cause of action based upon, arising out of, or relating to this Assignment and the transactions contemplated hereby shall be governed by, and construed in accordance with, the laws of the United States and the State of Delaware, without giving effect to any choice or conflict of law provision or rule (whether of the State of Delaware or any other jurisdiction).

6. Amendments. No amendment, modification or termination of this Assignment will be deemed valid unless in writing and signed by Assignor and Assignee.

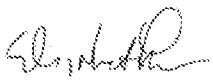
7. Purchase Agreement. This Assignment is being made and delivered pursuant and subject to the terms of the Purchase Agreement. In the event of any conflict or inconsistency between the terms of the Purchase Agreement and the terms of this Assignment, the terms of the Purchase Agreement shall govern. In no event will this Assignment expand, limit or otherwise modify, amend or change in any way the rights and obligations of Assignor and Assignee under the Purchase Agreement. All notices and other communications required or permitted to be delivered to either party hereunder shall be delivered as set forth in the Purchase Agreement.

[Signature Page Follows]

IN WITNESS WHEREOF, the parties hereto have executed this Patent Assignment on the dates set forth.

ASSIGNOR:

INVESTEDGE, INC.

By:  _____

Name: Elizabeth F. Pharo

Title: Chair

ASSIGNEE:

FIRST RATE, INC.

By: Craig Wietz

Name: Craig Wietz

Title: President

SCHEDULE A

PATENTS

Title	Jurisdiction	Patent Number	Issue Date
Integrated Investment Management System with Network Datafeed	USA	7,587,350	9/8/2009
Integrated Investment Management System with Network Datafeed and Incremental Database Refresh	USA	8,346,645	1/3/2013
Integrated Investment Management System with Network Datafeed and Incremental Database Refresh	USA	8,595,110	11/26/2013
Integrated Investment Management System with Network Datafeed and Incremental Database Refresh	USA	9,805,421	10/31/2017
Distributed Report Processing System and Methods	USA	7,565,394	7/21/2009
Distributed Report Processing System and Methods	USA	7,917,575	3/29/2011
Distributed Report Processing System and Methods	USA	8,078,666	12/12/2011
Distributed Report Processing System and Methods	USA	9,542,659	1/10/2017