CODE OF POLICIES

May 2016

(Containing Board Resolutions through March 2016)
# INTA CODE OF POLICIES

Table of Contents

<table>
<thead>
<tr>
<th>Preface</th>
<th>ii</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code of Policies</strong></td>
<td></td>
</tr>
<tr>
<td>Chapter I</td>
<td>General Provisions</td>
</tr>
<tr>
<td>Chapter II</td>
<td>Membership</td>
</tr>
<tr>
<td>Chapter III</td>
<td>Administration</td>
</tr>
<tr>
<td>Chapter IV</td>
<td>Programs</td>
</tr>
<tr>
<td>Chapter V</td>
<td>Communications</td>
</tr>
<tr>
<td>Chapter VI</td>
<td>Meetings</td>
</tr>
<tr>
<td>Chapter VII</td>
<td>Finances</td>
</tr>
<tr>
<td>Index</td>
<td>Index-1</td>
</tr>
</tbody>
</table>
PREFACE
INTA Code of Policies

HISTORY AND PURPOSE

This volume constitutes the first known codification of the general and permanent policies of the International Trademark Association. The resolutions of the INTA Board and the meetings of the Members in establishing such policies, as well as any policies formerly contained in the INTA Bylaws, have been collected and compiled since the 1890s, but without any systematic arrangement.

The purpose of the Code is to place all general and permanent policies of INTA, which are currently in effect, into an integrated and comprehensive volume with the topics arranged in logical order and with consistent language. The existence of such a Code will make it easier for members of the Board, and those charged with the responsibility to administer the policies, to be familiar with all general and permanent policies currently in force, regardless of the dates of their adoption. This inaugural Code of Policies is expected to provide an important source of information for INTA leaders.

INITIAL STEP

This first version of the Code is limited to a compilation of provisions that were removed from the Bylaws because these are matters that are less fundamental to the structure and organization of INTA. It is recognized that some areas still need the development of policies and that some of the policies may need restatement. Therefore, it is contemplated that the various chapters will be revised and supplemented, as time permits, in order to perfect and refine the Code as a comprehensive document. It is hoped that at least one of chapters can be revised and supplemented each year for the next several years until the Code is improved to the point of optimum usefulness. The goal is to make the Code a practical and helpful document, which will serve as a guide for the INTA Board and the Members.

ARRANGEMENT

Each chapter in the Code is intended to represent a separate subject, and each article is intended to represent a separate topic, as indicated by the titles. The chapters are numbered consecutively and are arranged in logical order for easy reference. A listing of the articles within the chapters is shown at the beginning of each chapter, and a listing of the sections within the articles is shown at the beginning of each article. If new articles become necessary between the issuance of revised editions of the Code, then such articles may be inserted in the appropriate location with an "A" following the number of the new article. For example, "Article 2A" may be added between Article 2 and Article 3.

NUMBERING

The Code sections are numbered progressively with Arabic numerals. A progressive rather than consecutive system is used in order to provide space for the insertion of additional sections within the articles to accommodate new policies in the future. Generally, the sections are numbered progressively by tens. For example, in Article 3 the first three sections are numbered 3.010, 3.020, and 3.030. New sections, as necessary, may be inserted between existing sections.
without changing any of the current numbers. For example, a new section between 3.010 and 3.020 could be 3.015 or any other number between 3.010 and 3.020, which illustrates the flexibility in the general numbering system.

Each section number also carries the number of the article in which it is found. The article number and the section number are separated by a decimal point. When it is recognized that the number to the left of the decimal point is the article number, and the number to the right of the decimal point is the section number within that article, the system is easily comprehended and utilized. For example, Section 7.050 means Section 50 in Article 7.

ANNOTATIONS

Annotations for development of the various sections of the Code are shown at the end of the sections. Initially, all of the sections will show an adoption date of March 2016, which will be noted as “Mar. 2016 Mtg., Res. Approving Amendments to Bylaws.” As the policies are amended, the sections will show the dates and the name of the Resolution of the applicable amendments. For example, if a section is amended by Board Resolution XYZ on May 21, 2016, the following notation will appear at the end of the amended section: “May. 2016 Mtg., Bd. Res. XYZ.”

When available, the “Source” notes at the end of the sections also show the historical development of the policies prior to adoption of the Code. “Cross reference” notes also are shown at the end of some of the sections to refer the reader to other sections of the Code for related topics. “Exhibit” notes also appear at the end of some sections to call attention to related documents in the exhibits portion of the Code.

INDEX

An index for the Code will eventually follow the last chapter. Index entries will be arranged in alphabetical sequence and will be made as concise as possible to enable rapid scanning of the index.

AMENDMENTS AND NEW POLICIES

The INTA Board will adopt new policies and amend existing policies in its regular course of business. In the case of amendments, the sections of the Code being amended will be referenced in the actions of the Board. In the case of new policies, the placement of the new policies in the Code will be referenced in the actions of the Board.

REVISED EDITIONS

The Code will be revised by the staff after each meeting of the Board of Directors.

ACKNOWLEDGMENTS

The Code has been prepared by members of the INTA staff and the INTA Presidential Task Force: Governance Review over a period of one year without the expense of consultants or contractors.
# Chapter I: General Provisions

**Article 1. The Code**

1.010. Purpose  
1.020. Citation  
1.030. Rules of Construction  
1.040. Definitions  
1.050. Relationship to the Bylaws  
1.060. Severability  
1.070. Repeal of Policies  
1.080. Implementation of Policies  
1.090. Amendments  
1.100. Revised Editions

# Chapter II: Membership

**Article 2. General Membership Categories and Guidelines**

2.010. General Membership Principles  
2.020. Regular Member  
2.030. Associate Member  
2.040. Government Member  
2.050. Academic Member  
2.060. Emeritus/Honorary Member

**Article 3. Membership and Administration**

3.010. Membership in INTA  
3.020. Classification Procedures  
3.030. Application for Membership  
3.040. Renewal of Membership  
3.050. Cancellation of Membership  
3.060. Membership Reinstatement Fee

**Article 4. Membership Resources and Benefits**

4.010. Eligibility  
4.020. Committee Participation  
4.030. Member Discounts  
4.040. Membership Directory  
4.050. Member Subscriptions and Archives  
4.060. Searchable Practice Guides and Publications  
4.070. Job Bank

**Article 5. Membership Directory**

**Article 6. Meetings and Attendance**

**Article 7. INTA Programs**

**Article 8. Finances**

**Article 9. Public Relations**

**Article 10. Officers**

**Chapter III: Administration**

**Article 11. International Trademark Association**

**Article 12. INTA President**

**Article 13. INTA Board of Directors**
### Article 14. Other Current and Past Officers of INTA

### Article 15. INTA Non-Permanent Committees

**15.010.** Purpose of Non-Permanent Committees

**15.020.** Non-Permanent Committee Structure

**15.030.** Meetings of Committees

### Article 16. INTA Chief Executive Officer

### Article 17. INTA Employees

### Article 18. INTA Intellectual Property

### Article 19. Licensing

### Article 20. Partnerships

### Article 21. INTA Guidelines for Sponsorship and Cooperation

### Article 22. Representative Offices

#### CHAPTER IV PROGRAMS

### Article 23. General Provisions

### Article 24. Structured Programs of INTA

### Article 25. INTA Awards

#### CHAPTER V COMMUNICATIONS

### Article 26. Official Language and Translation

### Article 27. Membership Communications

### Article 28. Public Relations and Information

### Article 29. Publications

### Article 30. Audio/Visual/Electronic Communications

### Article 31. Other Communications

#### CHAPTER VI MEETINGS

### Article 32. Annual Meeting

### Article 33. Leadership Meeting

### Article 34. General Policies of INTA Meetings

#### CHAPTER VII FINANCES

**35.010.** Annual Report

### Article 36. Audits

### Article 37. Budgets

### Article 38. Expenses and Reimbursements

### Article 39. Investments

### Article 40. Revenues

**40.010.** Member Dues

**40.020.** Dues Structure and Rates

**40.030.** Additional Directory Listings

**40.040.** Member Dues Refunds

**40.050.** Membership Promotions

**40.060.** Forms of Payment and Processing Fees
Article 41. Risk Management and Insurance

Chapter I

GENERAL PROVISIONS

Article 1. The Code

1.010. Purpose
The purpose of this INTA Code of Policies is to establish a comprehensive document containing all of the general and permanent policies of the International Trademark Association. All policies of a general and permanent nature adopted by the INTA Board after the effective date of this INTA Code of Policies will be added to the Code in order for it to remain a single collection of such policies. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.020. Citation
The policies contained in this INTA Code of Policies shall constitute and be designated the INTA Code of Policies and may be so cited. Such policies may also be cited simply as the “Code of Policies” or the “Code.” If desired, later editions may be designated by listing the month and year of the edition, such as “November 2016 INTA Code of Policies” or “November 2016 Code.” (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.030. Rules of Construction
All general provisions, terms, phrases and expressions contained in this Code are to be construed in a manner that allows for the implementation of policies. Words and phrases are to be taken in their plain or usual sense, but technical words and phrases having a particular or appropriate meaning in law or in the Bylaws or other official documents are to be understood according to their technical import. As used in this Code, the words “shall,” “is,” and “are” are mandatory, and the words “may” and “should” are permissive. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.040. Definitions
In the construction of this Code, the following definitions are to be observed unless the context clearly requires otherwise:

1) Association:
International Trademark Association.
2) **Board:**
The Board of Directors of the International Trademark Association.

3) **Chief Executive Officer:**
The Chief Executive Officer of the International Trademark Association. As used herein, “Chief Executive Officer” shall mean the Chief Executive Officer and/or the appropriate Association staff designated by the Chief Executive Officer.

4) **CEO:**
Chief Executive Officer.

5) **Designee:**
A director, officer, employee, partner or firm member appointed by each Regular Member and Associate Member to act on its behalf with respect to membership matters. The Designee of a Regular Member may be, as an alternative to a director, officer, employee, partner or firm member, an outside counsel or contractor who devotes substantially all of his or her professional time to the business of the Regular Member.

6) **INTA:**
International Trademark Association.

7) **Member:**
A Member of the International Trademark Association.

8) **Notice:**
Notice given to Members of the International Trademark Association as stated in the Bylaws.

9) **Person:**
“Person” includes an individual, firm, corporation or other legal entity.

10) **Representative:**
In addition to a Designee appointed to act on behalf of a Regular or Associate Member with respect to membership matters, a director, officer, employee, partner or firm member appointed for the purpose of any other matter relating to the Association, including but not limited to service on the Board of Directors, as an Officer, or as otherwise eligible and permitted by the Bylaws. The Representative of a Regular Member may be, as an alternative to a director, officer, employee, partner or firm member, an outside counsel or contractor who devotes substantially all of his or her professional time to the business of the Regular Member.

11) **Year:**
The twelve-month period that begins on 1 January.


**1.050. Relationship to the Bylaws**
This Code is supplemental to the Bylaws and should be construed in harmony with them. In the event of a conflict between the provisions of the Bylaws and the provisions of this Code, the
Bylaws take precedence and thereby modify the conflicting provisions of the *Code*. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.060. **Severability**
The chapters, articles, sections, and subsections of this *Code* are severable. If any chapter, article, section, or subsection of this *Code* is declared invalid by the judgment of any court or other agency of competent jurisdiction, such invalidity shall not affect any of the remaining chapters, articles, sections, or subsections of this *Code*. If any part of this *Code* is declared invalid by any court or agency of competent jurisdiction, it shall be invalid only within the jurisdiction of such court or agency. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.070. **Repeal of Policies**
When an action repealing a former policy is itself repealed or rescinded, such repeal or rescission shall not be construed to revive the former policy, unless such policy is expressly reinstated. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.080. **Implementation of Policies**
Unless noted to the contrary in a particular provision, the CEO shall have both the duty and the authority to implement the policies set forth in this *Code*. For that purpose, the CEO may prepare and approve policies, procedures, guidelines, rules, schedules and other documents to implement the policies. The CEO also may delegate authority for the implementation of various policies to one or more members of the staff, either by name or title. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.090. **Amendments**
Amendments shall become effective upon their adoption by the Board, unless a later date is specified in such action. When appropriate, the Board will delay the effective date of amendments to the *Code* in order to provide adequate notice of the changes or additions to the policies.

When amending this *Code*, the Board shall endeavor to specify the chapter, article, section, or subsection being amended or to designate the place in the *Code* for the new policies to be inserted. Failure to make such references shall not affect the validity of actions by the Board to adopt new or different policies. The CEO has the duty and authority to make technical corrections in the amendments adopted by the Board and to incorporate such corrections into the *Code*. Such corrections, if any, shall be reported to the Board at its next meeting. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

1.100. **Revised Editions**
The Code shall be revised after each meeting of the Board. Revised editions of the *Code* will bear the month and year of publication as part of the title, such as the *November 2016 INTA Code of Policies*. Revised editions, when duly prepared, will replace earlier editions of the *Code*. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)
Chapter II

MEMBERSHIP

Article 2. General Membership Categories and Guidelines

2.010. General Membership Principles
2.020. Regular Member
2.030. Associate Member
2.040. Government Member
2.050. Academic Member
2.060. Emeritus/Honorary Member

2.010. General Membership Principles
Members of the Association shall consist of Regular Members and Associate Members and rights shall be categorized accordingly. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.020. Regular Member
Any Person owning a trademark or other mark that is used in commerce to distinguish goods or services offered by that Person, or under the authority of that Person, shall be eligible to be a Regular Member, except that any Person who is eligible as an Associate Member or other Member category shall not be eligible to be a Regular Member. Each Regular Member shall have the right to one vote at all Stated Meetings of the Association. (INTA Bylaws, Article III, section 1.1)

Nonprofit status is not a determinative factor for eligibility to be a Regular Member. Rather, eligibility shall be determined as stated herein by category, regardless of nonprofit or for profit status. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.020.1. Small-Medium Sized Enterprises (SMEs)
Persons eligible for Regular Membership that have gross annual sales of US$100 million or less. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.020.2. Nonprofit (Regular)
Persons eligible for Regular Membership that are nonprofit organizations. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.020.3. University
Persons eligible for Regular Membership that are academic institutions. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.030. Associate Member
Any Person providing services related to brands, trademarks, related intellectual property and/or the laws of brands, trademarks or related intellectual property shall be eligible solely for Associate Membership. The use or ownership of one or more trademarks or other marks shall not qualify such Person for Regular Membership. Persons eligible for Associate Membership include but are not limited to duly licensed attorneys; law firms; trademark agencies and agents registered to practice before any governmental trademark office or patent office; chambers of commerce; trade
and membership associations; design firms and designers; advertising agencies; public relations and public affairs firms; domain name registrars and registries; and trademark search firms and investigation firms. The fact that an organization is a not-for-profit organization shall not affect the determination of whether it qualifies for Associate Membership. An Associate Member may be heard on any matters pertaining to the Association but shall not vote or be deemed part of a quorum at any Stated Meeting of the Association. A Person that is eligible for Regular Membership or any other category of Membership other than Associate Member shall not be eligible for Associate Membership. (INTA Bylaws, Article III, section 1.2) (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.030.1. Individual Associate
Individuals that are not employed by or affiliated with a firm or other organization. Examples include one attorney practicing by him or herself, regardless of other administrative staff (receptionists, secretaries, paralegals and trademark administrators) that may be employed. This category is designed to recognize the economic pressures that can affect an individual practitioner and does not apply to an attorney that employs other attorneys as full- or part-time consultants or freelancers, or an attorney who may be the only practicing trademark attorney within a larger firm. Firms with multiple locations do not qualify for this rate. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.030.2. Nonprofit (Associate)
Persons eligible for Associate Membership that are nonprofit organizations. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.030.3. Transitional
Any individual formerly eligible as or employed by a current Regular or Associate Member or other Member category who becomes unemployed by such Member shall be eligible for Transitional Membership. Transitional Membership shall be limited to an initial term of six months from the date of such unemployment, renewable for one additional 6-month term. Transitional Members shall be eligible to participate on an INTA committee or committees and such other transitional activities as the CEO and President deem necessary or appropriate, but shall otherwise have no rights of Regular or Associate Members. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.040. Government Member
Persons that are government agencies or entities, or individuals employed by such agencies or entities. A Government Member may be heard on any matters pertaining to the Association but shall not vote or be deemed part of a quorum at any Stated Meeting of the Association. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.050. Academic Member
An Academic Member may be heard on any matters pertaining to the Association but shall not vote or be deemed part of a quorum at any Stated Meeting of the Association. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)
2.050.1. **Professor**
A full-time professor who teaches at an accredited academic institution, except that professors who are also eligible as Associate Members shall be treated as Associate Members. Professors may be appointed as members of non-Board committees and may serve a leadership role thereon. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.050.2. **Student**
Full-or part-time students enrolled at a recognized academic institution and not currently employed by a Regular or Associate Member. Student Members may be appointed as members of non-Board committees but may not serve a leadership role thereon. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.050.3. **Student Bridging**
Persons eligible for Student Membership that are recent graduates from a recognized academic institution and currently unemployed. Eligibility for Student Bridging is only for one year after the graduation date. Student Bridging Members may be appointed as members of non-Board committees but may not serve a leadership role thereon. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.060. **Emeritus/Honorary Member**
Emeritus and Honorary Members shall be exempt from the payment of dues. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.060.1. **Emeritus Member**
Any individual who has been a Member, Designee or Representative of a Member and does not use or own a trademark or other mark, and is interested in the objectives of the Association shall be eligible to become an Emeritus Member, provided the individual gives written assurance:

(a) that such individual is fully retired as an employee of a corporation or as a partner or employee of a firm (except that Emeritus Membership may be granted to an attorney who is of counsel to a law firm provided such individual does not spend full time practicing law);

(b) that such individual will utilize INTA materials for personal use only, as distinguished from professional or other use; and

(c) that such material will be mailed only to such individual's home address.

An Emeritus Member may be heard on any matters pertaining to the Association but shall not vote or be deemed part of a quorum at any Stated Meeting of the Association. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

2.060.2. **Honorary Member**
The Board of Directors may by a majority vote elect as an Honorary Member of the Association any person who in its opinion has made a noteworthy contribution to the protection of trademarks or related intellectual property, to the advancement of the laws of trademarks or related intellectual property, or to the work of the Association. An Honorary Member may be heard on any matters pertaining to the Association but shall not vote or be deemed part of a quorum at any Stated Meeting of the Association. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

Article 3. Membership and Administration

3.010. Membership in INTA
3.020. Classification Procedures
3.030. Application for Membership
3.040. Renewal of Membership
3.050. Cancellation of Membership
3.060. Membership Reinstatement Fee

3.010. Membership in INTA
INTA membership runs from January 1 to December 31 and membership dues are non-refundable. To be eligible as a new Member, an organization must not have been a member in the prior calendar year, otherwise the organization is considered a renewing member.

When an organization becomes a Member, all employees at the organization’s location are considered Members and are entitled to INTA’s benefits and services. All individuals at a membership location have access to INTA’s Member benefits.

In order to qualify for the Member registration rate for an INTA program, an organization must be a Member in good standing at the time the program is held. If an employee of a Member organization registers for a program at the Member rate but by the time of the program the organization is no longer an INTA Member, the registrant must pay the non-member rate.


3.010.1 Umbrella Grouping of Organizations
INTA membership is organization and office-specific. INTA’s Member database groups organizations, headquarters, subsidiaries and affiliated organizations under an “umbrella.” This includes both Member and non-Member offices. The umbrella allows eligible organizations with multiple office locations to purchase membership for all offices at reduced pricing. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

3.010.2 Organization Rosters
All individuals affiliated with a Member location are entitled to INTA’s Member benefits and should be listed in the organization’s roster. Individuals can be added, deleted, or assigned a role in the organization’s roster according to the following definitions and rights for each role:

Designee: Each Member location must appoint ONE Designee to serve as the primary INTA contact for that location. The same Designee may represent multiple locations. Designees are listed in the print and online Directories Designees are
also INTA's contact for renewal and other Association-related events.

**Administrator:** Each Member location may appoint up to TWO Administrators within their organization. Administrators may have a username and password to access the INTA website and make changes to the organization record when necessary.

**Employee:** All Employees of a Member location may be included in their organization roster at no cost. They are entitled to all INTA benefits and resources, and they will receive regular INTA emails unless they choose to opt out.


**Cross References**

1.040. Definitions
40.040. Member Dues Refunds

3.020. **Classification Procedures**
All new Member applications are reviewed for accuracy of Member category classification before being accepted for membership. A yearly audit of Member records is also undertaken to review the Member classifications. Members are contacted if any discrepancies are found between the appropriate Member category and membership dues paid. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

3.030. **Application for Membership**
Each application for membership shall be submitted in a manner specified by the Association. The Chief Executive Officer or the Association staff designated by the Chief Executive Officer shall give prompt consideration to each applicant's qualification for membership in the category designated. The Chief Executive Officer or the Association staff designated by the Chief Executive Officer shall notify an applicant of its acceptance or rejection. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

3.040. **Renewal of Membership**
Each application for membership renewal shall be submitted in a manner specified by the Association. The Chief Executive Officer or the Association staff designated by the Chief Executive Officer shall give prompt consideration to each applicant's qualification for membership renewal in the category designated. The Chief Executive Officer or the Association staff designated by the Chief Executive Officer shall notify an applicant of its acceptance, rejection or need to modify membership classification. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

3.040.1 **Timeline for Renewal**
The timeline for renewal of membership shall be specified by the Association, but generally occurs from October through December 31. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

3.040.2 **Renewal Late Fee**
Membership renewal dues submitted on or after a date specified by INTA are subject to a late fee. Late fees may be waived at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive
3.050. Cancellation of Membership
A Member may cancel its membership by notice in writing to the Association accompanied by payment of any outstanding indebtedness to the Association. Should such cancellation be received by the Association on or after January 1st of any year, such Member shall not be entitled to any refund of dues previously paid for said year. Any exceptions to this cancellation policy are at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive Officer.

The Association may cancel a pending membership application if payment for a new membership is not received within 21 days of application for membership or if payment for renewal of membership is not received by a date specified by the Association, generally March 31. Any exceptions to this cancellation policy are at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive Officer.

40.040. Member Dues Refunds

3.060. Membership Reinstatement Fee
Any Member eligible for renewal whose annual dues remain unpaid by March 31st and who applies for membership renewal after March 31 is subject to a membership reinstatement fee. Membership reinstatement fees may be waived at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive Officer.

Article 4. Member Resources and Benefits

4.010. Eligibility
4.020. Committee Participation
4.030. Member Discounts
4.040. Membership Directory
4.050. Member Subscriptions and Archives
4.060. Searchable Practice Guides and Publications
4.070. Job Bank

4.010. Eligibility
When an organization becomes a Member, all employees at the organization’s location are considered Members and are entitled to INTA's Member resources and benefits. All employees at a Member location have the ability to create usernames and passwords to access Member resources.

4.020. Committee Participation
Only Members are eligible to apply to serve on INTA committees. All employees of a Member location are eligible to apply to serve on committees.
Cross References

Article 15.  INTA Non-Permanent Committees

4.030.  Member Discounts
All employees of a Member location are entitled to discounts on programs and events. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

4.040.  Membership Directory
All Designees, committee members, and Additional Directory Listings:
- are eligible to be listed in the print and online Membership Directory
- receive one free print copy of the Membership Directory
- have access to the online Membership Directory

Other INTA Members may access the online Membership Directory and purchase copies of the print directory.


Cross References

Article 5.  Membership Directory [RESERVED]

4.050.  Member Subscriptions and Archives
All employees of a Member location that are included in the Organization Roster will receive electronic subscriptions and access to archived issues of the INTA Bulletin, China Bulletin, Global Report and The Trademark Reporter. Individuals have the option to unsubscribe from these subscriptions. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

4.060.  Searchable Practice Guides and Publications
All employees of a Member location that are included in the Organization Roster and have created a username and password are entitled to access INTA's Searchable Practice Guides and Publications:

4.040.1  Searchable Practice Guides
- Cancellations Guides
- Country Guides
- Geographical Indications Guides
- Madrid Agreement & Protocol Guides
- Oppositions Guides
- Quick-Start Trademark Chart
- Trade Dress Guides
- Trademark Office Benchmarking Database

4.040.2  Publications
- Famous and Well-Known Marks
- Industry Perspectives
- Practitioners' Checklists
4.070. **Job Bank**

Only INTA Member locations in good standing may post job openings on INTA’s Job Bank. All employees of a Member location that are included in the Organization Roster and have created a username and password are entitled to post job openings on INTA’s Job Bank. Anyone may apply for a position posted on the INTA Job Bank. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

Article 5.  Membership Directory [RESERVED]

Article 6.  Meetings and Attendance [RESERVED]

Article 7.  INTA Programs [RESERVED]

Article 8.  Finances [RESERVED]

Article 9.  Public Relations [RESERVED]

Article 10.  Officers [RESERVED]

Chapter III

**ADMINISTRATION**

Article 11.  International Trademark Association [RESERVED]

Article 12.  INTA President [RESERVED]

Article 13.  INTA Board of Directors [RESERVED]

Article 14.  Other Current and Past Officers of INTA [RESERVED]

Article 15.  INTA Non-Permanent Committees

15.010.  Purpose of Non-Permanent Committees

15.020.  Non-Permanent Committee Structure

15.030.  Meetings of Committees

15.010.  **Purpose of Non-Permanent Committees**

Participation on an INTA Committee offers member volunteers, together with the INTA Staff Liaison, the opportunity to share their collective expertise and common interests on a wide variety of Committees, focusing on:

- Advocacy of trademarks and related intellectual property
- Resources dedicated to trademarks and related intellectual property
• Communication and implementation of INTA’s strategic objectives
• Planning educational programs and events


15.020. **Non-Permanent Committee Structure**
The committee structure for the 2016 – 2017 Committee Term consists of the following:

**Advocacy Group**
Anticounterfeiting Committee
Brands and Innovation Committee
Copyright Committee
Data Protection Committee
Designs Committee
Emerging Issues Committee
Enforcement Committee
Famous and Well-Known Marks Committee
Geographical Indications Committee
Harmonization of Trademark Law and Practice Committee
Indigenous Rights Committee
International Amicus Committee
Internet Committee
Legislation and Regulation Committee
Non-Traditional Marks Committee
Parallel Imports Committee
Right of Publicity Committee
Trademark Office Practices Committee
Unfair Competition Committee

**Resources Group**
Academic Committee
Alternative Dispute Resolution Committee
Government Officials Training Committee
In-House Practitioners Committee
Law Firm Committee
Leadership Development Committee
Pro Bono Committee
Publications Committee
Saul Lefkowitz Moot Court Competition Committee
Trademark Administrators Committee
The Trademark Reporter Committee
Young Practitioners Committee

**Communications Group**
Building Bridges Committee
Impact Studies Committee
INTA Bulletins Committee
Public and Media Relations Committee
Public Information Committee
Unreal Campaign Committee
15.030. **Meetings of Committees**

Any member of a Committee may participate in a meeting thereof by means of a conference telephone, videoconference, or similar communications equipment. Participation by such means shall constitute presence in person at a meeting as long as all persons can hear all other persons participating in the meeting at the same time and may participate in all matters before the committee. Any action required or permitted to be taken at any meeting of a committee may be taken without a meeting if all members of the committee consent to the adoption of a resolution authorizing the action. If written, the consent must be executed by the member by signing such consent or causing his or her signature to be affixed to such consent by any reasonable means including, but not limited to, facsimile signature. If electronic, the consent must be sent by electronic mail and must set forth information from which it can be reasonably determined that the consent was authorized by the member. (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

**Article 16. INTA Chief Executive Officer [RESERVED]**

**Article 17. INTA Employees [RESERVED]**

**Article 18. INTA Intellectual Property [RESERVED]**

**Article 19. Licensing [RESERVED]**

**Article 20. Partnerships [RESERVED]**

**Article 21. INTA Guidelines for Sponsorship and Cooperation [RESERVED]**

**Article 22. Representative Offices [RESERVED]**

**Chapter IV**

**PROGRAMS**

**Article 23. General Provisions [RESERVED]**

**Article 24. Structured Programs of INTA [RESERVED]**

**Article 25. INTA Awards [RESERVED]**

**Chapter V**

**COMMUNICATIONS**
Article 26. Official Language and Translation [RESERVED]

Article 27. Membership Communications [RESERVED]

Article 28. Public Relations and Information [RESERVED]

Article 29. Publications [RESERVED]

Article 30. Audio/Visual/Electronic Communications [RESERVED]

Article 31. Other Communications [RESERVED]

Chapter VI

MEETINGS

Article 32. Annual Meeting [RESERVED]

Article 33. Leadership Meeting [RESERVED]

Article 34. General Policies of INTA Meetings [RESERVED]

Chapter VII

FINANCES

Article 35. General Finance Provisions

35.010. Annual Report
At the Annual Meeting of Members of the Association, the Board of Directors shall direct the Chief Executive Officer (or his or her designee) to present the audited annual report of the Association, certified by an independent public or certified public accountant or a firm of such accountants selected by the Board of Directors, showing in appropriate detail the following:

(a) The assets and liabilities, including the trust funds, of the Association as of the end of the fiscal year terminating not more than six months prior to the Annual Meeting of Members;
(b) The principal changes in assets and liabilities, including trust funds, during such fiscal year;
(c) The revenue or receipts of the Association, both unrestricted and restricted to particular purposes, during such fiscal year;
(d) The expenses or disbursements of the Association, for both general and restricted purposes, during such fiscal year; and
(e) The number of Members of the Association as of the date of the report, together with a statement of increase or decrease in such number during such fiscal year, and a statement of the place where the names and places of residence of the current Members may be found.
The annual report shall be filed with the records of the Association and either a copy or an abstract thereof entered in the minutes of the proceedings of the Annual Meeting of Members.


**Article 36. Audits [RESERVED]**

**Article 37. Budgets [RESERVED]**

**Article 38. Expenses and Reimbursements [RESERVED]**

**Article 39. Investments [RESERVED]**

**Article 40. Revenues**

40.010. **Member Dues**  
The annual dues for all Member categories shall be determined by the Board of Directors. (INTA Bylaws, Article IV, section 2) (March 2016 Mtg., Bd. Res. Approving Amendments to Bylaws)

40.020. **Dues Structure and Rates**  
In order to provide comprehensive dues alternatives, emphasize the value of key Member benefits, and better balance out revenue streams, the dues structure and rates shall be reviewed by the Board of Directors every two years, beginning with the May 2015 Board meeting. (May 2015 Mtg., Bd. Res. Revised Dues Proposal)

**REGULAR MEMBER OPTIONS**

<table>
<thead>
<tr>
<th>Option</th>
<th>Membership Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>US $2,000</td>
<td>Regular+ — all offices of an organization are entitled to membership (best option for organizations with global offices)</td>
</tr>
<tr>
<td>US $1,200</td>
<td>Regular — one office of an organization is entitled to membership</td>
</tr>
<tr>
<td>US $800</td>
<td>Regular add on — second office of an organization that has already paid for Regular membership entitled to reduced rate (this will also entitle all offices of the organization to Regular+ membership at no additional cost)</td>
</tr>
</tbody>
</table>
US $1,200  
Small-Medium Sized Enterprise+ (SME+) — all offices of a SME are entitled to membership

US $700  
Small-Medium Sized Enterprise (SME) — one office of a SME is entitled to membership

US $500  
SME add on — second office of an organization that has already paid for SME membership entitled to reduced rate (this will also entitle all offices of the organization to SME+ membership at no additional cost)

US $700  
Nonprofit (Regular)

US $700  
University

ASSOCIATE MEMBER OPTIONS

US $1,200  
Associate — one office of an organization is entitled to membership

US $1,200 + $850 per additional office  
Associate+ — offices 2-11 entitled to membership for $850 per office

US $9,700 = $1,200 + ($850 x 10)  
Associate+ with max out of payment — pay for 11 offices and all offices are entitled to membership (best option for organizations with global offices)

US $525  
Individual Associate — an individual otherwise eligible for Associate membership that is not employed by or affiliated with a firm or other organization

US $700  
Nonprofit (Associate)

US $100  
Transitional — 6 month membership for an individual currently not employed and renewable for one additional 6 month term

GOVERNMENT MEMBER OPTIONS

US $700  
Government
ACADEMIC MEMBER OPTIONS

- US $75  Professor
- US $25  Student
- US $100 Student Bridging

HONORARY/EMERITUS MEMBER OPTIONS

- US $0  Honorary and Emeritus


40.030. Additional Directory Listings
The cost of Additional Directory Listings in the print and online Membership Directory shall be determined by the Chief Executive Officer or the Association staff designated by the Chief Executive Officer. The cost for Additional Directory Listings is non-refundable. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

Cross References

Article 5. Membership Directory [RESERVED]

40.040. Member Dues Refunds
Member dues are non-refundable. Any exceptions to this refund policy are at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive Officer. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

40.050. Membership Promotions
Offering membership promotions and/or special membership pricing for a limited time is at the discretion of the Chief Executive Officer or the Association staff designated by the Chief Executive Officer. (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

40.060. Forms of Payment and Processing Fees
INTA accepts the following payment options:
1) Credit card
2) Check (plus processing fee)
3) Wire transfers upon special request with completion of banking forms and payment of processing fees (May 2016 Mtg., Bd. Res. Approving Amendments to INTA Code of Policies)

Article 41. Risk Management and Insurance [RESERVED]
End of INTA Code of Policies
March 2016
INDEX

(To be created on completion of full version of Code.)