

# Trademark Usage Guidelines For Third Parties January 1, 2019

For Further Questions Contact TrademarkInfo@TheVillages.com

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# Trademark Usage Guidelines For Third Parties

Holding Company of The Villages, Inc. ("Holding Company") is the owner of a variety of common law and federally registered trademarks relating to The Villages<sup>®</sup> community that we and our affiliates and licensees use to provide a wide range of products and services. We offer these guidelines to help others understand how they can refer to The Villages<sup>®</sup> community without violating our trademark rights. We update these guidelines periodically, and persons and companies relying on them should review them regularly for updates. Absent unusual circumstances, Holding Company will not object to uses of its trademarks made in compliance with these guidelines, as updated from time to time.

## The General Idea

"The Villages" is a trademark that informs consumers that the services and products they are buying are provided by the developer of The Villages<sup>®</sup> community and its related companies ("The Villages Companies"), or their authorized licensees. Only The Villages Companies and their licensees may use "The Villages" as a trademark.

Because "The Villages" is also the name of our community, we understand there are times when folks have to use "The Villages" to refer to our community, inform customers that they serve the needs of our residents, or are located convenient to the community's boundaries. Such uses are "fair uses" so long as they refer to the community without implying any official connection with it or The Villages Companies or their licensees. Problems can arise, however, if third parties use "The Villages" as a trademark or in some way that makes it hard for consumers to tell whether or not they are affiliated with or endorsed by The Villages Companies.

For example, if a travel agent were to call itself "Jones Travel" and advertise that they help families plan trips to the Disney World<sup>®</sup> Resort, that would likely be fair use. If the same company were to call itself "Disney World Travel," or were to use the domain name <DisneyWorldTravel.com>, then people could reasonably assume that they were related to the theme park's developer. That would likely not be fair use since consumers could be confused and think that they were dealing with Disney when, in fact, they were dealing with an unrelated third party. The same is true of "The Villages." If Jones Landscaping wants to say that they serve members of The Villages<sup>®</sup> community on the website hosted at <JonesLandscaping.com>, that is likely fair use. If they wanted to rename themselves "The Villages Landscaping," or advertise using <TheVillagesLandscaping.com> that would likely cause confusion and not be "fair use."

### What are The Villages Marks?

"The Villages Marks" include

- THE VILLAGES (the words themselves, in any font),
- The Villages (the "Script Logo," usually, but not always, used in green), and
- other trademarks such as AMERICA'S HEALTHIEST HOMETOWN, FLORIDA'S FRIENDLIEST HOMETOWN, BROWNWOOD, GOLF CAR APPROVED, and a number of marks that include THE VILLAGES or these other marks as part of logos or designs.

You can generally tell when a logo or word is considered to be a trademark of The Villages Companies because it will be used with "TM," "SM" or <sup>®</sup> (which means that it is the subject of a federal trademark registration). Holding Company has more than 40 federal trademark registrations. For a list of registered trademarks, please consult the USPTO database available at www.uspto.gov/trademarks-application-process/search-trademark-database.

If you have questions about whether or not The Villages Companies consider a word, phrase or logo to be a trademark, please email us at TrademarkInfo@TheVillages.com.

## Isn't The Villages just a place?

People sometimes think "The Villages" is just the name of a place that can be used freely like Orlando, Tampa, Philadelphia, or Miami. While it is the name of our community, and as such appears on maps and can sometimes be used in an address, it is more than a place name—it is also a trademark.

Places like Orlando, Tampa, Philadelphia, and Miami are not developed communities created by one developer. When a developer creates a community, and gives it a name that did not exist previously in that area, the name of the community is called a "coined term" and serves as a trademark.

THE VILLAGES is a coined term created by The Villages Companies. That means it serves as a trademark with respect to our community, real estate-related services, and other goods and services despite the fact that it also appears on maps, in a census, and as part of an address. While you might not need anyone else's permission to adopt the trademark ORLANDO REAL ESTATE SALES (because Orlando is a geographic location that is not associated with a single developer), you would need Holding Company's permission to adopt the trademark THE VILLAGES REAL ESTATE (no, don't ask—Holding Company won't give its permission—it's just an example). The law is clear that a coined term can retain its trademark status even if it is also a physical location. For more information, consult a lawyer and refer them to TMEP 1210.02(a) as a starting point.

We use "The Villages" and other marks that incorporate "The Villages" for a variety of goods and services beyond real estate. We use The Villages Marks in connection with services such as health care, sports and entertainment venues, and products such as clothing and golf carts. Holding Company's trademark rights extend well beyond real estate. Even where The Villages Companies may not be in a specific business, The Villages<sup>®</sup> brand is so well known that seeing "The Villages" used in connection with virtually any product or service is likely to lead consumers to believe that it is associated with The Villages Companies. In legal terms, this is called dilution, and it can sometimes also be false advertising.

### Does that mean I can't ever use THE VILLAGES?

Of course not. You can refer to The Villages® community in a variety of ways.

You just cannot do it in a way that creates a likelihood of confusion with respect to any of the marks used by The Villages Companies, or unfairly trades on their reputation. These guidelines are intended to help businesses understand how they can refer to our community without infringing Holding Company's rights.

Holding Company and its affiliates want third-party companies to offer goods and services to our community residents. Having a vibrant community of competing businesses is good for residents. We just ask that unlicensed third parties do not use our marks (or similar marks) in a way that harms our rights in The Villages Marks or leads to consumers being confused and thinking that third-party companies are somehow affiliated with Holding Company and its affiliates when, in truth, they are not.

These guidelines try to map out some "safe harbors" by giving examples of uses that we will not object to absent unusual circumstances. Every situation is different and this document does not provide any legal advice. It just provides samples and guidelines that, if followed, should steer you clear of trademark disputes with us or make it easy to resolve if a dispute does arise.

# What should I do if I receive a letter from Holding Company objecting to my use of "The Villages?"

Talk to us! Most situations like that are the result of simple misunderstandings and can be cleared up quickly and easily. We are happy to work with companies to help them find ways to refer to the community that will not cause confusion or harm our rights. In most cases, doing so is good for you as well because it helps make sure that your investment in marketing is used to build value in your own brands independent from ours.

## Can you sum this all up somehow?

Each situation is different and Holding Company considers each circumstance individually. There is no one, simple, "one-size-fits-all" rule that always applies in every case. In most cases, however, the following rules of thumb will not steer you wrong:

- Do not use the logo **The Villages**, the **V** logo, or any other stylized logo owned by The Villages Companies without entering into a license agreement with Holding Company.
- If an address is within the community, you can use "The Villages" in the address, including in your marketing materials, but do not use "The Villages" in the address, or use "in The Villages," "at The Villages," "Villages Office," etc. if the address is not inside the community—it confuses people and can be misleading advertising.
- You may not use THE VILLAGES or VILLAGES as part of your business name or your logo, domain name, Facebook name, email address or brand. People who see THE VILLAGES or VILLAGES used in that way are likely to think they are getting information from or about one of The Villages Companies when, in truth, they are not.
- If you refer to the community, please use "The Villages® community" or "The Villages® development." Provided your references are truthful, fair, and not misleading as to any sponsorship, affiliation or endorsement by Holding Company or its affiliates, Holding Company will not object to these types of uses. For examples of how this can be done fairly, please see below.
- If you use something that looks similar to THE VILLAGES in your company name or brand, (e.g. "Village Dry Cleaners") please make sure it does not give the impression that you are associated with Holding Company or its affiliates. For example, avoid THE VILLAGE, emphasizing the V, or using a script font or color scheme that looks like the one used on our website hosted at <www. thevillages.com>.

## The following pages outline Some Examples

## Stylized Script

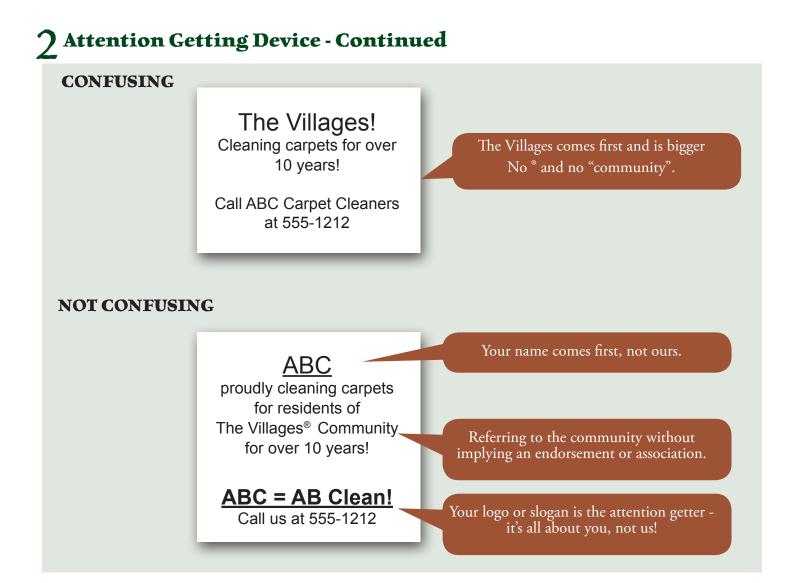
Neither **The Villages**, nor the stylized letter **V** (nor any similar stylized script versions) may be used absent the written consent of Holding Company. These stylized logos are reserved exclusively for use by Holding Company, its affiliates and its authorized licensees. If you refer to the community, please refer to it only as "The Villages<sup>®</sup> community," or "The Villages<sup>®</sup> development" and in a font and style that does not make it look like our logos.

CONFUSING	ABCY Corporation offers carpet cleaning to <b>The Villages</b> .		
NOT CONFUSING	ABCY Corporation offers carpet cleaning services to residents of The Villages <sup>®</sup> community.		
CONFUSING	Victory Pest Control, We corral your critters.		
NOT CONFUSING	Victory Pest Control, We corral your Critters!		
<b>CONFUSING</b> <i>Dilla</i>	a. Dry Cleaners - Dress for Success (using green/gold color scheme)		
NOT CONFUSING	Villa Dry Cleaners - Dress for Success (using different color scheme)		

## **7** Attention Getting Device

When referring to The Villages<sup>®</sup> community, "The Villages" should never be used as the attention getting device. It's fine to use it to provide information, but you should not use it as the "lead" or "draw" in your advertising.





## **2** Affiliation & Endorsement

When referring to The Villages<sup>®</sup> community, "The Villages" should never be used (**a**) in a manner that suggests or implies that a product or service is endorsed by, licensed by, affiliated with, or sponsored by Holding Company or its affiliates, (**b**) in combination or close proximity to the words "official," "authorized," "original" or other terms that imply sponsorship or endorsement by Holding Company or its affiliates, or (**c**) in combination or close proximity to any logo or mark that resembles a seal or a certification mark of a third party.

#### Examples shown on page 8

## **3** Affiliation & Endorsement - Continued

#### CONFUSING

ABCY Corporation – The Villages official carpet cleaner!

ABCY Corporation – THE Carpet Cleaner of The Villages!

ABCY Corporation – The Villages Approved!

ABCY Corporation – The Villages 🥏

The Villages Experts

#### **NOT CONFUSING**

ABCY Corporation – the carpet cleaner preferred by residents of The Villages<sup>®</sup> community!

ABCY Corporation – Certified professionals serving residents of The Villages<sup>®</sup> community

Independent Real Estate Experts specializing in The Villages<sup>®</sup> community

ABCY 🧼 — trusted professionals conveniently located near The Villages<sup>®</sup> community

## **4** Goods & Services Identification

Neither "Villages," "The Villages," nor anything confusingly similar may be used as or in a brand, trademark or service mark for third-party goods or services.

#### CONFUSING

The Villages No-Stain Carpet

Home of The Villages Banana Split!

Villages hats available here

#### **NOT CONFUSING**

Happy Paws No-Stain Carpet – for Pet Lovers in The Villages® community

Banana-Rama – The Banana Split preferred by residents of The Villages<sup>®</sup> community!

# **5** Company Name

Neither "Villages," "The Villages" nor any confusingly similar variations should be used in the name of a company to suggest an affiliation with Holding Company or its affiliates.

#### CONFUSING

Exceptional Carpet Cleaning of The Villages, LLC.

Villages Carpet Cleaners, Inc.

#### NOT CONFUSING

Exceptional Carpet Cleaners, Inc.

## 6 Use As an Adjective

"The Villages" should never be used as a noun. "The Villages" should always be used as an adjective to describe the community or goods and services offered by The Villages Companies and their licensees. It should always be followed by a superscript registration symbol<sup>®</sup> and a noun, preferably the word "community" or "development."

#### CONFUSING

ABCY Corporation offers carpet cleaning to The Villages.

ABCY Corporation offers carpet cleaning to residents of The Villages.

ABCY Corporation – the carpet cleaner of The Villages!

#### NOT CONFUSING

ABCY Corporation offers carpet cleaning services to residents of The Villages<sup>®</sup> community.

Convenient to The Villages® development

## 7 Geographic Location & Addresses

"The Villages" is a coined term created by the community's creators. The Villages® community has become famous through the efforts, marketing, and goodwill of Holding Company and its affiliates. Before we created the community, and invested millions of dollars promoting it, nobody had ever heard of "The Villages." If there is any present geographic connotation to that name, it flows from our efforts and not from any pre-existing geographic name or designation. Here are some examples of how you can refer to the community as a location fairly, without infringing Holding Company's rights:

#### Examples shown on page 10

## **7** Geographic Location & Addresses - Continued

#### CONFUSING

ABCY Financial Services—The Villages (for a company with an address outside the community)

Happy Heart Cardiologists—The Villages office (for a medical practice not located inside the community)

#### **NOT CONFUSING**

ABCY Corporation is located 1.5 miles from The Villages® community.

ABCY Corporation is located within The Villages<sup>®</sup> community.

Businesses not located within The Villages<sup>®</sup> community should not advertise or imply that they are "in The Villages." Only businesses located within The Villages<sup>®</sup> community may use The Villages as part of their address.

#### **NOT CONFUSING**

Located Outside the Community	Located Within the Community	
ABCY Corporation with offices located 1.5 miles from The Villages® community.	ABCY Corporation 123 Lake Sumter Landing The Villages FL	
ABCY Corporation Convenient to The Villages <sup>®</sup> community	ABCY Corporation - Conveniently located in The Villages® community!	

## 8 Domain Names

The term "The Villages" (and confusingly similar variations that suggests an affiliation with Holding Company or its affiliates) should not be contained in your domain name. This helps prevent Internet users from being confused as to whether you or Holding Company and its affiliates are the source of the website and is intended to help consumers of The Villages<sup>®</sup> community's goods and services distinguish between licensed and unlicensed providers of Holding Company and its affiliates' goods and services. The same is true of social media accounts (e.g. Facebook pages), communication handles (e.g. Twitter handles), and app names (e.g. iPhone<sup>®</sup> and Android<sup>®</sup> cellular phone applications).

#### CONFUSING

TheVillagesCleaners.com TheVillagesExperts.com CarpetsinTheVillages.com Villages Navigator (as the name of an app)

#### **NOT CONFUSING**

ABCY.COM

Never Lost in Florida (as the name of an app)

#### **O** Confusing Similar Variations

These Guidelines also apply to business names, trademarks or service marks which are not only identical, but also confusingly similar to The Villages Marks. Trademark laws are designed to prevent consumer confusion as to the source of goods and services. Please be careful to choose trademarks and service marks which are NOT confusingly similar to the marks, so that consumers have no doubt as to the source of goods and services, and consumers are informed as to the entity or individual they are doing business with.

Holding Company reserves the right to consider each situation on a case-by-case basis, however Holding Company generally does not object to marks that do not use THE VILLAGES or THE VILLAGE, or VILLAGES. If any other form of VILLAGE is used, Holding Company generally does not object so long as the fonts, designs and color schemes do not mimic those used in The Villages marks or at <www.thevillages.com>.

#### CONFUSING

THE VILLAGES dry cleaners or THE VILLAGE dry cleaners

VILLAGES dry cleaners

VilagesRealEstate.com

TheVlgsRealEstate.com

The Villagers News

# 10 Taglines

Holding Company owns federally registered trademarks for various taglines associated with The Villages<sup>®</sup> community, such as "Florida's Friendliest Hometown," "America's Healthiest Hometown," "Golf Car Approved" and "We're Golf Car Friendly!" Third parties may not use these taglines or confusingly similar variations without Holding Company's written permission.

# 11 Copyright

Copyright is an additional form of protection provided by law to the authors of "original works of authorship" in content, including literary, dramatic, musical, artistic, website, and certain other works. Copyright protection gives the owner the exclusive legal right to reproduce, publish, sell, and create derivative versions of the works.

Holding Company and its affiliates hold copyright in the stylized versions of the marks, maps of The Villages<sup>®</sup> community, floorplans, and the iconic architectural elements of The Villages<sup>®</sup> community. Holding Company and its affiliates also hold copyright in their marketing and advertising material, signage, websites and Facebook pages.

Any copying of content from literature or the websites of Holding Company and its affiliates is strictly prohibited by copyright law, including photographs, artwork, maps, text, floorplans, and the compilations which together constitute their websites.

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	This is a custom image from our home page. If you need a map, don't copy ours. Please use one you license or one you create yourself.
	This floorplan is our artistic rendering of a home. It may not be copied for other uses.
	This bridge is an icon of the community and has unique architectural elements. You can, of course take pictures of it for any non-commercial use, but to use it in an advertisement or commercial implies an affiliation with the community. Please don't use it that way.
The second second	This sign is also a community icon. You can take pictures of it for non-com- mercial uses, but its prominent inclusion of our logo and tag line means that use in an advertisement is likely to cause confusion. Please do not use our signs to promote your business.

# 12 Disclaimers Help, but they Don't Cure!

If using The Villages Marks on websites in compliance with these Guidelines, we also ask that thirdparty website home pages contain a plain statement that the website is not affiliated with or endorsed by Holding Company, such as:

THE VILLAGES<sup>®</sup> is a registered trademark of Holding Company of The Villages, Inc. \_\_\_\_\_ [insert your name or company name]\_\_\_\_\_\_ is not affiliated with, or sponsored by, Holding Company of The Villages, Inc. or its affiliated entities.

This statement should appear in text no smaller than the font used for the majority of the content on the home page (in contrast to legal notices or links at the bottom of the page). For purposes of these Guidelines, the home page is any web page which serves as a landing page from other sites or which is reached by typing in your domain name.

Please do not make the mistake, however, of thinking that you can use The Villages Marks any way you like so long as you include a disclaimer. For example, you can never use the logos without our permission, regardless of whether or not you have a disclaimer. In addition, if you use "Villages" or "TheVillages" in a domain name, you can't cure the problem by simply adding a disclaimer to your website.

# 13 Linking

Linking refers to situations where a website or application provides a hyperlink that allows the user to jump to a site or content owned by a third party. Sometimes, the user is transported completely out of the site or app they are viewing into the third-party site or app (a "simple link"). Other times, one site or app will open the third-party site or content in a frame or otherwise within the original site ("framing"). "Deep Linking" refers to simple links to, or framing of, pages within a site, as opposed to the home page of the third-party site.

Framing of all or any portion of any website of Holding Company, its affiliates or its licensees is strictly prohibited in all circumstances.

Simple linking to the home page of websites of Holding Company, its affiliates or its licensees is permitted, so long as the link does not create the impression that your site is affiliated with, or endorsed by, Holding Company or its affiliates or licensees. Deep linking to pages of websites of Holding Company, its affiliates or its licensees is only permitted when the page being linked to prominently displays the stylized V in the upper left corner of the page. All other deep linking is prohibited.

## 13 Linking - Continued

When linking to websites of Holding Company, its affiliates or its licensees, the link should not appear in such a way so as to confuse the user as to whether or not the linking site is affiliated with, or endorsed by, Holding Company or its affiliates or licensees. The link should be in text and should not be an image of The Villages<sup>®</sup> community or a copy of any of its logos or copyrighted material. It may be a non-descript word (e.g. <u>click here</u>) or a clear reference to the community (e.g. <u>The Villages<sup>®</sup> community</u>). Under no circumstances may it be an image of a location outside of The Villages community, an image or reference to of any other community, an image of a building, sign or structure in another community, or any third-party trademark or service mark. "<u>Villages</u>" alone should never be used as a hyperlink.

## Putting it all together

Having a vibrant business community that offers choices and promotes competition is good for all of us, especially our community residents. If unauthorized companies use our marks (or similar marks) in a way that confuses consumers or harms the value of the marks we worked so hard, and invested so much to make famous, it results in an environment that is bad for consumers and unfair to those businesses that compete fairly. These guidelines, and the examples they offer, are intended to provide clarity and help third parties understand what we feel is fair use of The Villages Marks, and what isn't. We believe that following them will help businesses communicate clearly and effectively with consumers (including our community residents) in a way that helps those businesses build their own brands, without confusing consumers or unfairly using our brands. We hope that you agree.

## Just to be sure we are being clear...

Holding Company reserves the right to amend these Guidelines from time to time. You should review these Guidelines periodically to determine if any changes have occurred. The date of publication of these Guidelines is shown on the footer of each page. If the last time you reviewed these Guidelines the date shown was earlier than the date below, you should review this latest version to ensure that you are aware of all changes.

It should be understood that these are guidelines only. Each and every use of a trademark, service mark, trade name, domain name, social media identifier, etc. will be evaluated by Holding Company on an individual basis. Holding Company reserves all rights in connection with its intellectual property, including the right to assert that any use by a third party is infringing, even if it may be argued that such use is a fair use or is permitted under some reading of these Guidelines. Each such situation will be evaluated on a case-by-case basis as it comes to the attention of Holding Company. These Guidelines are not intended to constitute legal advice, an offer, a license, or a consent.

> For Further Questions Regarding Third Party Usage Contact: TrademarkInfo@TheVillages