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Subject: U.S. Trademark Application Serial No. 87834383 - TSSP OPPORTUNITIES PARTNERS - 18-1046 - Request for Reconsideration Denied - Return to TTAB - Message 1 of 4

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United States Patent and Trademark Office (USPTO)
Office Action (Official Letter) About Applicant's Trademark Application

U.S. Application Serial No. 87834383

Mark: TSSP OPPORTUNITIES PARTNERS

Correspondence Address:
JOHN A SQUIRES

DILWORTH PAXSON LLP

1500 MARKET STREET SUITE 3500E

PHILADELPHIA, PA 19102

Applicant: Austin IP, LLC

Reference/Docket No. 18-1046

Correspondence Email Address:

tmconfirm@dilworthlaw.com

REQUEST FOR RECONSIDERATION

AFTER FINAL ACTION

DENIED

Issue date: **January 10, 2020**

The Office has reassigned this application to the undersigned trademark examining attorney.

Applicant's request for reconsideration is denied. *See* 37 C.F.R. §2.63(b)(3). The trademark examining attorney has carefully reviewed applicant's request and determined the request did not: (1) raise a new issue, (2) resolve the outstanding issue, (3) provide any new or compelling evidence with regard to the outstanding issue, or (4) present analysis and arguments that were persuasive or shed new light on the outstanding issue. TMEP §§715.03(a)(ii)(B), 715.04(a).

<u>Objection to Evidence</u>

Applicant has submitted a list of registrations within their Request for Reconsideration dated November 11, 2019 at p. 4-5. However, the mere submission of a list of registrations does not make such registrations part of the record. *See In re Peace Love World Live, LLC*, 127 USPQ2d 1400, 1405 n.17 (TTAB 2018) (citing *In re 1st USA Realty Prof'ls*, 84 USPQ2d 1581, 1583 (TTAB 2007); *In re Duofold Inc.*, 184 USPQ 638, 640 (TTAB 1974)); TBMP §1208.02; TMEP §710.03.

To make third party registrations part of the record, an applicant must submit copies of the registrations, or the complete electronic equivalent from the USPTO's automated systems, prior to appeal. *In re Star Belly Stitcher, Inc.*, 107 USPQ2d 2059, 2064 (TTAB 2013); TBMP §1208.02; TMEP §710.03. Accordingly, these registrations and any arguments based thereon will not be considered.

Moreover, applicant's arguments were carefully considered and found to be unpersuasive for the following reasons.

Applicant primarily argues applicant's mark is not confusingly similar to registrant's mark in appearance, sound, connotation and commercial impression, because applicant's mark when viewed in its entirety includes the additional words "OPPORTUNITIES PARTNERS", whereas registrant's mark just consists of the acronym "TSSP". *See* Request for Reconsideration dated November 11, 2019 at p. 2-3. However this is unpersuasive, because both applicant's mark and the registrant's mark share the identical dominant distinctive acronym of **TSSP**. Moreover, consumers are generally more inclined to focus on the first word, prefix, or syllable in any trademark or service mark. *See Palm Bay Imps., Inc. v. Veuve Clicquot Ponsardin Maison Fondee En 1772*, 396 F.3d 1369, 1372, 73 USPQ2d 1689, 1692 (Fed. Cir. 2005) (finding similarity between VEUVE ROYALE and two VEUVE CLICQUOT marks in part because "VEUVE . . . remains a 'prominent feature' as the first word in the mark and the first word to appear on the label"); *Century 21 Real Estate Corp. v. Century Life of Am.*, 970 F.2d 874, 876, 23 USPQ2d 1698, 1700 (Fed Cir. 1992) (finding similarity between CENTURY 21 and CENTURY LIFE OF AMERICA in part because "consumers must first notice th[e] identical lead word"); *see also In re Detroit Athletic Co.*, 903 F.3d 1297, 1303, 128 USPQ2d 1047, 1049 (Fed. Cir. 2018) (finding "the identity of the marks' two initial words is particularly significant because consumers typically notice those words first"). In this case, the first term and dominant feature of applicant's mark is the acronym **TSSP**, which is identical to the entirety of registrant's mark **TSSP**.

In addition, adding a term to a registered mark generally does not obviate the similarity between the compared marks, as in the present case, nor does it overcome a likelihood of confusion under Section 2(d). *See Coca-Cola Bottling Co. v. Jos. E. Seagram & Sons, Inc.*, 526 F.2d 556, 557, 188 USPQ 105, 106 (C.C.P.A. 1975) (finding BENGAL and BENGAL LANCER and design confusingly similar); *In re Toshiba Med. Sys. Corp.*, 91 USPQ2d 1266, 1269 (TTAB 2009) (finding TITAN and VANTAGE TITAN confusingly similar); *In re El Torito Rests., Inc.*, 9 USPQ2d 2002, 2004 (TTAB 1988) (finding MACHO and MACHO COMBOS confusingly similar); TMEP §1207.01(b)(iii). In the present case, applicant's mark adds the phrase **OPPORTUNITIES PARTNERS** to the end of registrant's mark **TSSP**, which does not obviate the similarity between the compared marks nor does it overcome a likelihood of confusion under Section 2(d). Further, the registrant's mark **TSSP** is wholly encompassed within the applicant's mark **TSSP OPPORTUNITIES PARTNERS**, thus, purchasers are likely to believe that applicant's mark merely identifies an additional line of accounting, business, tax, banking and financial services. Specifically, purchasers are likely to believe that the mark **TSSP OPPORTUNITIES PARTNERS** identifies a new line of accounting, business, tax, banking and financial services offered under the **TSSP** line of financial services. Incorporating the entirety of one mark within another does not obviate the similarity between the compared marks, as in the present case, nor does it overcome a likelihood of confusion under Section 2(d). *See Wella Corp. v. Cal. Concept Corp.*, 558 F.2d 1019, 1022, 194 USPQ 419, 422 (C.C.P.A. 1977) (finding CALIFORNIA CONCEPT and surfer design and CONCEPT confusingly similar); *Coca-Cola Bottling Co. v. Jos. E. Seagram & Sons, Inc.*, 526 F.2d 556, 557, 188 USPQ 105, 106 (C.C.P.A. 1975) (finding BENGAL LANCER and design and BENGAL confusingly similar); *In re Integrated Embedded*, 120 USPQ2d 1504, 1513 (TTAB 2016) (finding BARR GROUP and BARR confusingly similar); *In re Mr. Recipe, LLC*, 118 USPQ2d 1084, 1090 (TTAB 2016) (finding JAWS DEVOUR YOUR HUNGER and JAWS confusingly similar); TMEP §1207.01(b)(iii). Thus, the marks are identical in part and confusingly similar.

Additionally, the services are related, because many companies offer both applicant's and registrant's services and market these services under the same mark, as shown by the evidence attached to the Final Office Action dated January 14, 2019 at p. 2-27, http://www.marcumllp.com/services, http://www.morgcpa.com/client_services.html, http://allaccountingservices.com/business-services/, http://allaccountingservices.com/individual-services/, https://www.titantaxes.com/tax-services.html, https://www.titantaxes.com/accounting-services.html, https://www.titantaxes.com/business-consulting-services.html, https://www.titantaxes.com/other-services.html, https://www.goldmansachs.com/what-we-do/index.html, https://www.suntrustrh.com/investment-banking, https://www.suntrustrh.com/corporate-banking, https://dadavidson.com/WHAT-WE-DO/Investment-Banking/Services, https://www.investmentbank.barclays.com/banking.html#d-c-m, http://www.rwbaird.com/investment-banking/services-offerings, https://www.ccabalt.com/strategic-advisory-services, https://www.ccabalt.com/investment-banking-services and https://www.ccabalt.com/valuation-financial-opinions.

Furthermore, the trademark examining attorney has attached evidence from the USPTO's X-Search database consisting of a number of third-party marks registered for use in connection with the same or similar services as those of both applicant and registrant in this case. This evidence shows that the services listed therein, namely, "Investment advice; Investment management; Investment consultation;

Investment of funds for others; Accounting services; Business development services; Business consulting services; Business information services; Tax consultation; Tracking and monitoring insurance compliance for business purposes; Financial management; Financial asset management; Business brokerage services and related consulting; Investment banking services; Investment advisory services" are of a kind that may emanate from a single source under a single mark. *See In re I-Coat Co.*, 126 USPQ2d 1730, 1737 (TTAB 2018) (citing *In re Infinity Broad. Corp*., 60 USPQ2d 1214, 1217-18 (TTAB 2001); *In re Albert Trostel & Sons Co.*, 29 USPQ2d 1783, 1785-86 (TTAB 1993); *In re Mucky Duck Mustard Co.*, 6 USPQ2d 1467, 1470 n.6 (TTAB 1988)); TMEP §1207.01(d)(iii). *See* the third party registrations attached herein.

The overriding concern is not only to prevent buyer confusion as to the source of the services, but to protect the registrant from adverse commercial impact due to use of a similar mark by a newcomer. *See In re Shell Oil Co.*, 992 F.2d 1204, 1208, 26 USPQ2d 1687, 1690 (Fed. Cir. 1993). Therefore, any doubt regarding a likelihood of confusion determination is resolved in favor of the registrant. TMEP §1207.01(d)(i); *see Hewlett-Packard Co. v. Packard Press, Inc.*, 281 F.3d 1261, 1265, 62 USPQ2d 1001, 1003 (Fed. Cir. 2002); *In re Hyper Shoppes (Ohio), Inc.*, 837 F.2d 463, 464-65, 6 USPQ2d 1025, 1026 (Fed. Cir. 1988).

Based on the facts of this application record and the evidence therein, the marks are confusingly similar and the services are related.

Accordingly, the following refusal made final in the Office action dated January 14, 2019 is **maintained and continued**:

- Section 2(d) Refusal – Likelihood of Confusion

See TMEP §§715.03(a)(ii)(B), 715.04(a).

If applicant has already filed an appeal with the Trademark Trial and Appeal Board, the Board will be notified to resume the appeal. *See* TMEP §715.04(a).

/Rebecca Lee/

Examining Attorney

Law Office 122

(571) 272 - 7809

Rebecca.Lee1@uspto.gov

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Marcum LLP provides a full spectrum of traditional tax, accounting and assurance services; advisory, valuation and litigation support; and an extensive range of specialty and niche industry practices. The Firm serves both privately held and publicly traded companies, as well as high net worth individuals, private equity and hedge funds, with a focus on middle-market companies and closely held family businesses.

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- Cost Segregation
- EB-5 Investor Services
- Family Wealth Services
- Financial Statements
- International Taxation
- Marcum Family Office
- Modern Family & LGBT Services
- Personal Financial Management
- State & Local Taxation
- Tax Controversy
- Tax Credits & Incentives
- Tax Return Compliance
- Tax-Exempt Business
- Transaction Advisory
- Transfer Pricing
- Trusts & Estates

Assurance

- Attestation Engagements
- Audits
- Compilations & Reviews
- Cybersecurity
- Employee Benefit Plans
- International Financial Reporting
- IT Risk & Assurance
- Mergers & Acquisitions
- SEC Advisory Services
- SEC Services
- SOC Reports
- Transaction Services

Advisory

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- Bankruptcy
- Business Interruption Claims
- Computer Forensics
- Financial Advisory
- Forensic Services
- Risk Management
- Robotic Process Automation
- Seized Evidence & Property

Advisory

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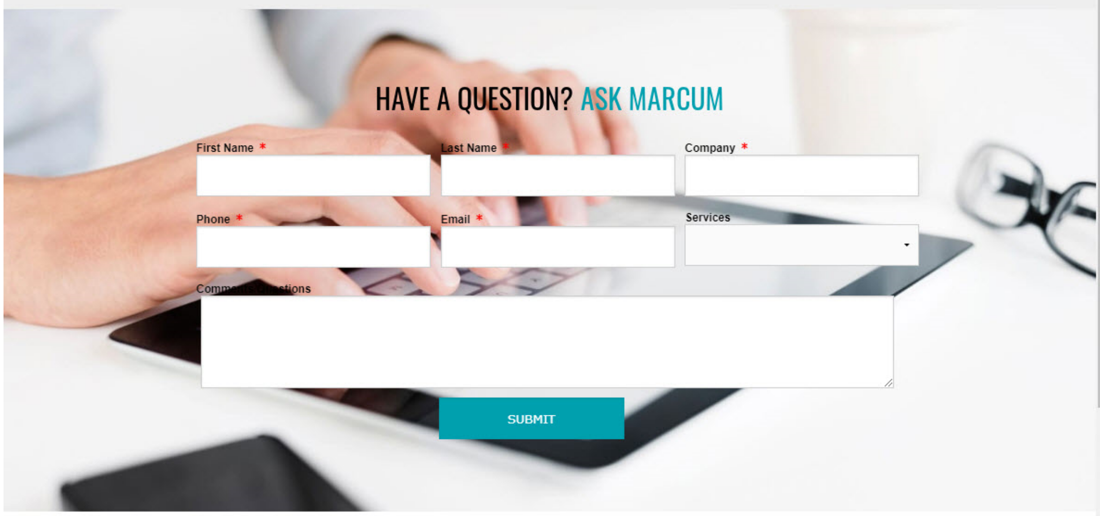
- Bankruptcy
- Business Interruption Claims
- Business Process Outsourcing Solutions
- Civil & Criminal Fraud
- Computer Forensics
- Financial Advisory
- Forensic Services
- Insolvency Analyses
- Loan Portfolio & Credit Risk
- Performance Improvement
- Risk Management
- Robotic Process Automation
- Seized Evidence & Property Audits
- Workplace Security & Investigations

Valuation and Litigation Support

- Business Valuations
- Corporate Transactions
- Disputes and Litigation
- ESOP Valuation Services
- Financial Reporting
- Industry-Focused Practice Area
- Tax
- Litigation Support
- Economic Damages
- Infringement of Copyrights, Trademarks
- Personal Injury, Wrongful Death
- Financial Forensic Investigations
- Marital Dissolution

Managed Services

- Managed Accounting Services
- Managed Human Resources Services
- Managed IT Services
- Nonprofit Search



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Certified Public Accountants & Business Advisors

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Our firm offers a wide range of services to our individual and business clients. Because our firm is relatively small, our clients benefit by getting personalized, quality service that is beyond comparison. Below we have listed the services that we offer to our clients along with a brief description.

As the list below is by no means all-inclusive, please feel free to inquire about a service if you do not see it listed. If it is not a service we provide, we would be more than happy to refer you to a qualified professional.

Accounting Services

Accounting Services

Our firm can assist you in the following Accounting Services:

- Preparation of Financial Statements
- Management analysis
- Stockholder and owner reporting
- Budgeting and cash flow analysis
- Financial forecasts and projections
- Preparation of company books - company books are necessary in the preparation of financial statements and tax returns. A formal set of company books is required for corporations.
- General ledger, journals
- Trial balance reports
- Reconciliation of bank accounts
- General bookkeeping duties

- Reconciliation of bank accounts
- General bookkeeping duties

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Audit, Reviews and Compilations

Depending on your business needs, MWE offers the following financial statement services:

Audit – we will obtain an understanding of your internal control and assess fraud risk and also obtain audit evidence through inquiry, physical inspection, observation, third-party confirmations, examinations, and other procedures. Audtis are typically needed for the following:

- DOL – For 5500 Compliance (mainly employee benefit plans with over 100 employees like 401(k), 403(b), defined contributions plans, etc.)
- Yellow book – For companies that receive federal funds exceeding a certain threshold (starting in 2015 – this threshold is $750,000)
- Non-profit – For compliance with state regulations (in some states if you solicit funds from the public – you will need an audit)
- For-profit – For compliance with lenders or investors

Review– we will perform procedures (primarily analytical procedures and inquires) to will provide a reasonable basis for obtaining limited assurance that there are no material modifications that should be made to the financial statements.

Compilation – the most basic level of service CPAs provide; we assist management in presenting financial information in the form of financial statements without undertaking to obtain or provide any assurance that there are no material modifications that should be made to the financial statements.

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Accounting Software Assistance

We are a QuickBooks Pro Advisor and assist with the installation and implementation of QuickBooks Pro and QuickBooks online.

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Outsourced Controllership

If you have an organization that needs a part-time controller to assist with accounting and oversight, we can help.

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Consulting Services

Accounting Software Selection & Implementation

We have experience with a number of popular software accounting packages that we can assist you in implementing.

- Design of accounting systems
- Implementation accounting systems for: cash receipts, cash disbursements, purchases, sales, accounts receivable, accounts payable, job costing, inventory, internal financial reporting

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Tax Services

Estate & Trust Tax Preparation and Planning

- Planning for reduction of estate taxes
- Work with your attorney as part of the team for reviewing your estate plan and wills
- Assistance with tax implications of estate planning
- Consultation on business continuation agreements
- Planning with life insurance; use of life insurance as a family wealth preservation vehicle
- Tax planning related to charitable bequests
- Valuation of estate assets - closely-held and family business ownership taxes
- Trustee services
- Family limited partnerships - a major vehicle in reducing family estate taxes

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Tax Services

- Preparation of tax returns
- Individual
- Partnership
- Limited Liability Company (LLC)
- Corporate
- Trust
- Estate
- Gift
- Informational tax returns
- Pension/Profit Sharing/401(k) plans
- Payroll
- Resident and non-resident alien tax issues and tax returns

- Resident and non-resident alien tax issues and tax returns
- Response to tax notices and assessments from IRS and other government agencies

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Other Services

Mergers & Acquisitions

- Proposed acquisitions and/or mergers analysis
- Review of acquiring and/or acquired company's financial statements
- Assistance with issues related to manner and method of merger
- Accounting for the financing phase of the acquisition
- Business valuation services and consulting

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Miscellaneous

Financial Planning for Business and High Net Worth Individuals

- Discuss strategies for building wealth
- Work with a registered investment advisor as part of the team for investment planning
- Personal analysis as to how the changes in the newest tax legislation will affect your financial situation
- Retirement planning

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IRS, State and Local Government Tax Audits

- Representation before the Internal Revenue Service - examination, appeals and criminal investigation levels
- Representation before state and local government agencies for income, business tax and sales tax audits: Commonwealth of Pennsylvania, State of New Jersey, City of Philadelphia, and numerous other state and local jurisdictions throughout the US

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Litigation Support Services and Forensic Accounting

- Investigative Accounting
- Shareholder dispute issues
- Partnership dispute issues
- Loss of profits/financial damages
- Divorce
- Expert witness testimony
- Prepare forensic accounting reports in conjunction with litigation support

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Management Advisory Services/Business Planning and Consulting

We provide advice to business owners and corporations, entrepreneurs and family-owned businesses.

Succession Planning

- Family businesses - planning for succession to the next generation
- Buy-sell, stockholder and partnership agreements consultation

Executive Planning

- Management incentive programs development
- Selection and installation of business retirement plans
- Non-qualified deferred compensation plans - for executives and key employees

New Business Services

- New business evaluation and start-up assistance
- Choice of business entity advice
- Business plan preparation and review assessment

Operational analysis and evaluation

- Operational review of existing accounting system
- Internal control structure efficiency assessment
- Assistance in development of credit and collection policies
- Effective inventory management for small manufacturing clients
- Accounting and bookkeeping systems design

Financial Analysis

- Ratio analysis and comparative study with similar firms in the industry

- Representation before the Internal Revenue Service - examination, appeals and criminal investigation levels
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- Assistance in development of credit and collection policies
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Financial Analysis

- Ratio analysis and comparative study with similar firms in the industry
- Budget development
- Break-even analysis and projections

Human Resources

- Accounting personnel (controller, bookkeeper) - assist management in interviewing and hiring new accounting employees

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Retirement Plan Asset Accounting

- Preparation of the annual accounting, books and financial statements required for qualified retirement plans
- Preparation of the annual computation for amounts payable by the employer to eligible employees under defined contribution pension, profit sharing, 401(k) plans, SEP and SIMPLE retirement plans
- Preparation of the "Schedule of Participants Accounts" for the year – valuation report for plan trustees
- Preparation of the "Statement of Participant Account" – valuation report for each eligible plan participant
- Preparation of the Summary Annual Report (SAR) – the annual disclosure form required by the U.S. Department of Labor
- Preparation of IRS Forms 5500 – informational tax return

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- 1120 – C-Corporation Tax Return from **$450**
- 1065 – LLC or General Partnership/LLP from **$400**
- Sch C – LLC Single Member from **$250**

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Titan Tax & Accounting Services (Dearborn)
5466 Schaefer Road
Dearborn, MI 48126
Toll Free: (855) 720-2600
Local: (313) 846-9600

Titan Tax & Accounting Services (Detroit)
7607 W Vernor Hwy
Detroit, MI 48209
Toll Free: (855) 720-2600
Local: (313) 765-1099

> Accounting Services

At Titan Tax & Accounting Services LLC, we recognize that accurate, well-organized financial information is critical to your corporate or personal financial health. Our detail-oriented and insightful staff is committed to providing the comprehensive reports, analysis, and services you need to manage your finances and assess your financial position. We offer a broad spectrum of meaningful and cost-effective accounting and auditing services, from bookkeeping services to financial statement preparation to financial analysis to help you to manage your finances efficiently and accurately.

Cloud-Based Accounting System

At Titan Tax & Accounting Services LLC, we leverage the power of the cloud to offer an accounting system that allows us to work collaboratively with you, our clients, minimizing costly and time-consuming errors and maximizing efficiency. This highly-customizable system gives you as much or as little direct involvement in your accounting and bookkeeping processes as you like – anything from simply entering checks and deposits to handling advanced bookkeeping transactions. Because you use the same system we use to analyze your trial balance and prepare your financials, this cloud-based system is safe, secure, and eliminates the time-consuming process of transferring data back and forth, for maximum efficiency and flexibility.

Bookkeeping/Write-Up Services

To succeed in business, you need to know where you are, financially. Well-organized, accurate financial records help your business run more efficiently, and are fundamental to the business decisions you are called upon to make every day. Titan Tax & Accounting Services LLC has the expertise to provide thorough full-charge bookkeeping services, including general journal and subsidiary ledger maintenance, bank statement reconciliation, and tracking and analysis of receivables and payables to help you keep your financial information accurate and up-to-date.

Expert Financial Analysis

Understanding your financial health, including the movement of money into and out of your business, can make a critical difference to your short-term financial planning, and to your overall business success. At Titan Tax & Accounting Services LLC, our financial experts have the knowledge and insight to provide expert cash flow and budgeting analyses that can help you gain a clear picture of your company's financial position, minimize cost overruns, lost purchase discounts, and uncollectable receivables, and recognize potential strengths and weaknesses in your overall business plan. This value-added service is an indispensible tool for businesses, allowing you to plan intelligently for variations in your cash flow, and identify the best possible short-term financial strategy for your company.

Thorough Financial Analysis

Whether as the basis for important corporate decisions by a business owner or the foundation of a prospective investor's interest, an accurate and up-to-date financial statement is critical to the success of any business. With deep experience in financial and management accounting, Titan Tax & Accounting Services LLC brings integrity, insight, and experience to the preparation of professional, GAAP-compliant financial statements as well as tailor-made financial analyses. As your trusted business advisor, Titan Tax & Accounting Services LLC can help you accurately evaluate your company's assets, liabilities, equity, income, and expenses to assess and report on its financial health, and can assist management to identify and eliminate inefficiencies to realize an organization's full profit potential.

Compilation, Review, and Audit Analysis

Titan Tax & Accounting Services LLC provides professional compilation, review, and audit services to businesses of all sizes. We bring a passion for detail and accuracy and a wealth of accounting and auditing experience to the examination of your financial statements. Whether you need a detailed audit for your bank, a review for potential investors, or a compilation for your annual report, or your company has a reporting or compliance need outside the standard scope of any of these, Titan Tax & Accounting Services LLC can quickly and accurately compile your financial records into meaningful GAAP-compliant financial statements that adhere to the highest standards, offer limited-scope review testing, and can deliver complete audit attestation.

> Business Consulting Services

At Titan Tax & Accounting Services LLC, our experienced staff of business consultants is committed to assisting you through every phase of the business life cycle, applying our experience and insight to provide you with meaningful and practical strategies and solutions to address the issues facing your business. From incorporation through business succession planning, we provide the comprehensive advice, insight, and technical expertise you need to help your business achieve success at any stage.

Incorporation and New Business Analysis

Starting a business is challenging on many levels, from the hard work of establishing yourself in the marketplace to the complexities of managing the paperwork, and it's easy to become overwhelmed without expert advice. With years of real-world, hands-on business experience behind us, the team of detail-oriented professionals at Titan Tax & Accounting Services LLC will not only help you to evaluate the advantages and disadvantages of corporations, partnerships, and LLCs, ensuring that you select the right entity for your new business, but can also guide you through formulating a business plan, dealing with any necessary registration, permitting, or licensing processes, managing compliance with local, state, and federal laws, and can even provide a market evaluation to allow you to position your new business as advantageously as possible in the marketplace, or a business valuation, if you are considering the purchase of an existing business.

Employee Benefit Plans

The employee benefit plan landscape has changed dramatically over the last few years, and our staff of specialists is committed to helping you navigate these changes. We can review your existing plans for ERISA and tax compliance, and we can help you to understand your workforce, your objectives, and the advantages and deficiencies of your current employee benefit plan, analyze the marketplace with your specific requirements in mind, and uncover the best fit for your objectives and employees. At Titan Tax & Accounting Services LLC, we strive to provide creative, comprehensive employee benefit plans and can help you weigh the complex benefits and costs posed by today's qualified and nonqualified pension and profit sharing plans, including 401(k), SEP, SEP IRA, Keogh, life insurance, and health insurance plans.

Business Valuations

At Titan Tax & Accounting Services LLC, we provide quick, efficient, and cost-effective business valuation services for financial reporting and asset valuation, estate planning and administration, intellectual property valuation, portfolio review and capital management, strategic planning, mergers and acquisitions, divestitures, succession planning, divorce proceedings, taxation planning and compliance, reorganization and bankruptcy, partner disputes, and litigation support. We combine extensive valuation, accounting, asset management, and industry expertise with up-to-date analysis and valuation tools, superb research capabilities, a deep understanding of what drives value in your business, and the insight to address complex valuation issues.

Business Purchase or Sale Analysis

If you are thinking about buying a business, the team of experts here at Titan Tax & Accounting Services LLC has the hands-on experience, the passion for detail, and the insight to provide a holistic view of any transaction, from comprehensive assessments of potential purchases to business valuation services to analysis of the financial, tax, and operational implications of any purchase. Titan Tax & Accounting Services LLC can advise prospective business purchasers about local market conditions, industry trends, and the financial condition of an acquisition candidate. Alternatively, if you are thinking of selling your existing business, Titan Tax & Accounting Services LLC can help you plan for the sale, identifying any structural or financial changes you need to make to maximize your company's value and obtain the best possible sale price and contract payout terms.

Management Consulting

In today's rapidly-changing business environment, the right management strategy can make the difference between a struggling organization and a thriving one. To drive value in your organization, you need thoughtful, candid advice from a trusted advisor with the real-world experience and knowledge to help you determine an achievable management strategy, optimize your business processes, and produce sustainable value for your organization. At Titan Tax & Accounting Services LLC, we leverage our associates' business acumen to offer complete management advisory services, including systems implementation and management, process analysis, change management, business transformation, workflow analysis, enterprise risk management, cost controls, employee benefit plan restructuring, and much more to help your organization improve performance, implement industry best practices, and maximize growth.

Mergers and Acquisitions Assistance

Mergers and acquisitions are complex transactions that can have a substantial and lasting impact on both you and your company's future. At Titan Tax & Accounting Services LLC, our team of experienced counselors has the practical business experience and insight to provide the creative, effective advice you need to navigate the challenges inherent in any merger or acquisition. From performing the necessary due diligence and requisite financial analysis to investigating alternative financing sources to assessing the tax implications to guiding you through financial disclosures and non-compete agreements, our experienced Mergers and Acquisitions counselors work with you to obtain the best possible outcome in any transaction. Titan Tax & Accounting Services LLC brings the sound judgment, business acumen, deep resources, and responsive, collaborative philosophy you need to protect your interests.

Financial Forecast and Projections

Financial planning is critical to the success of any business, and at Titan Tax & Accounting Services LLC, we are committed to working with you to create a thoughtful and comprehensive plan to achieve your business objectives. We provide a complete range of financial and business forecasting services, and can also create customized "What If" planning scenarios to help management foresee and plan for unexpected business contingencies. Titan Tax & Accounting Services LLC has the experience, the innovative thinking, and the insight to help your organization identify and manage risk, quantify resources, and formulate and achieve your strategic goals and objectives.

Business Succession and Exit Planning

You worked hard to establish a successful business, and thoughtful business succession or exit planning is the key to ensuring that your business will continue to flourish in the future, without your day-to-day involvement. Too often, healthy, successful businesses are negatively impacted by a lack of succession or exit planning, from unclear transfer of leadership to liquidity problems stemming from unexpected inheritance taxes or costs. As experts in the field of business succession and business exit planning, Titan Tax & Accounting Services LLC can help you to design a comprehensive strategy to avoid these problems and achieve your objectives, giving you the peace of mind that comes from knowing that your business will enjoy a smooth continuance, and your heirs and business associates will be well protected.

Business Hours
Mon-Fri 9:00A.M.-5:00P.M.*
Sat-Sun Closed*
***Open Later During Tax Season and On Weekends.**

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TITAN TAX®
& ACCOUNTING SERVICES

> Other Services

At Titan Tax & Accounting Services LLC, we focus on serving the accounting and financial planning needs of our diverse clientele. We believe that, with careful planning, you can overcome any financial obstacle. Our experienced and versatile staff can help you to assess your financial needs and develop a plan to achieve financial security and face any challenge life brings. From detailed accounting to investment review and analysis to education, retirement, and estate planning services, we can help you to achieve your goals.

Debt and Financial Services

Many Americans are feeling the pain of large credit card or student loan balances, or are dealing with high mortgage-related or medical expenses, and can't see a way to resolve them. At Titan Tax & Accounting Services LLC, we offer complete experienced, responsive debt and financial counseling services, including installment debt consolidation, refinancing, and repackaging. We provide sensible and sensitive budgeting and planning assistance, working with you to design an achievable roadmap to a healthier financial future.

Educational Funding

More than ever, a college education is the key to the future, but college costs are rising rapidly, far outstripping the normal rate of inflation, and many sources of financial aid have disappeared, leaving many young people staggering under the weight of student loan debt. As a result, planning for your family's educational needs is more important than ever before. At Titan Tax & Accounting Services LLC, our financial expertise can help you to determine the best approach to save for your children's education, including setting up 529 plans, prepaid tuition plans, or Coverdell accounts, and to take advantage of other tax-favorable treatment of education expenses, such as the Hope and Lifetime Learning Credits.

Retirement Planning Services

It is never too early to start planning for retirement if you want to maintain your current lifestyle, or achieve an even better one. Careful planning helps you avoid common pitfalls and retirement planning mistakes and puts you on a solid footing to ensure that your retirement lives up to your expectations. At Titan Tax & Accounting Services LLC, our retirement planning specialists listen to your objectives and goals, evaluate your current circumstances, and collaborate with you to formulate a comprehensive, achievable retirement plan. We compare the relative benefits of stocks, bonds, and other retirement assets, and explain the differences between retirement plans, including standard IRAs, tax-deferred annuities, and Roth IRAs. No matter where you are now – whether just starting out or close to retirement age - Titan Tax & Accounting Services LLC can analyze your projected income and expenses and suggest investment funding techniques to help put you on the road to achieving your retirement dreams.

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Goldman Sachs

What We Do

We commit people, capital and ideas to help our clients, shareholders and the communities we serve to grow. At Goldman Sachs, we:

Advise

We advise companies on buying and selling businesses, raising capital and managing risks, which enables them to grow.

Finance

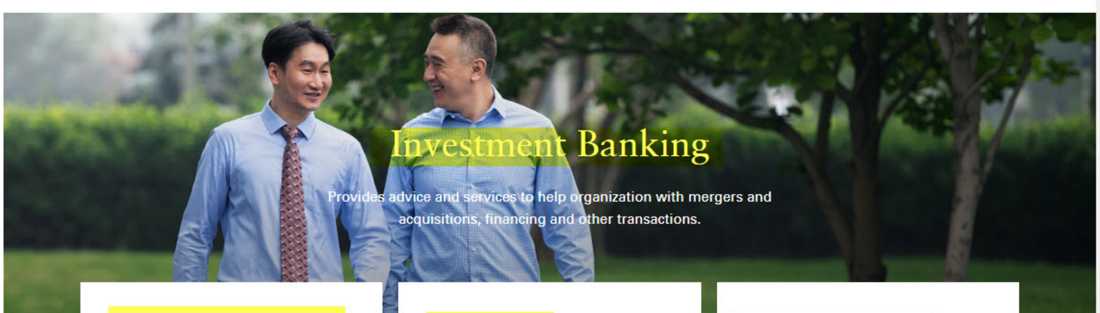
Transact

Support

Manage

Invest

Innovate



Investment Banking

Provides advice and services to help organization with mergers and acquisitions, financing and other transactions.

Mergers & Acquisitions

Our bankers provide mergers and acquisitions advice and services to our clients on some of their most important strategic decisions and transactions.

Financing

The Financing group structures and executes a variety of transactions, including equity offerings, debt issuances, and derivative transactions.

Industry Sectors

Our global structure allows us to better serve the strategic and financing needs of our clients across all geographies and industries.

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Consumer Banking

Marcus by Goldman Sachs offers no-fee, unsecured personal loans; a high-yield Online Savings Account and certificates of deposit; and Clarity Money, a personal financial management app.

Asset Management

We provide investment management services and offer investment products across all major asset classes to a diverse set of institutional and individual clients.

Private Wealth Management

We offer wealth advisory services, including portfolio management and financial counseling, and brokerage and other transaction services to high-net-worth individuals and families.

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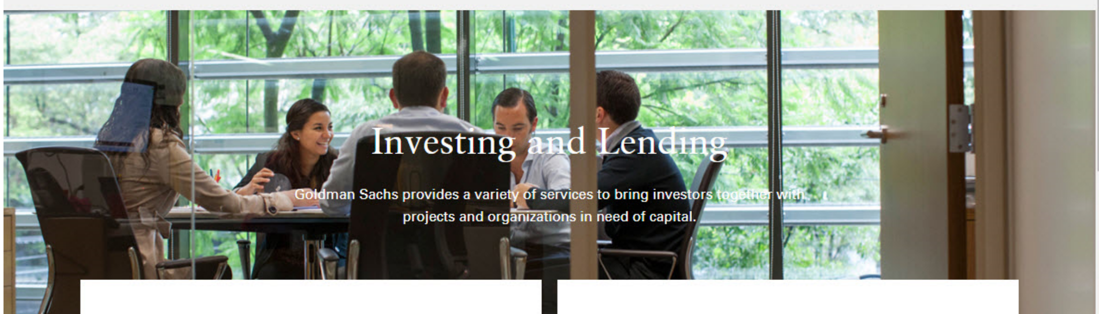

Direct Private Investing

Direct Private Investing is offered through the Goldman Sachs Merchant Banking Division (MBD). MBD is the primary center for Goldman Sachs' long term principal investing activity, and Goldman Sachs has operated this business as an integral part of the firm for more than 25 years.

Impact Investing

At Goldman Sachs, we believe that strong communities are the foundation of a prosperous society. Through the work of our Urban Investment Group, we find innovative commercial solutions that address social and civic challenges in communities across the United States.

Launch With GS

Launch With GS is Goldman Sachs' commitment to invest $500 million in women-led companies and investment managers. In our efforts to narrow the gender investing gap, we are also building a global network of business leaders to facilitate connections, share ideas, and uncover opportunities.

Middle Market Financing and Investing

Global investing business, specializing in principal investing and lending in all levels of capital structures.

Investment Banking Solutions

We offer a complete array of corporate banking and investment banking products and advisory services for companies of all sizes, across all industries. More about our investment banking solutions is below. Also view our Corporate Banking solutions.

Debt Capital Markets

Raising capital through debt can provide companies with effective financing and structuring solutions. Our Debt Capital Markets Group helps clients navigate the increasingly complex and specialized credit markets to secure attractively priced funding across a wide spectrum of products and services.

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Asset Finance Solutions

Effective asset financing can help you maximize liquidity, increase debt capacity, and optimize your capital structure. Our Asset Financing Group delivers a wide range of financing solutions to put the left-hand side of your balance sheet to work more efficiently. We combine market-leading structuring expertise with detailed industry insights and broad distribution capabilities to design a customized strategy that best meets your firm's needs.

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Equity Capital Markets

The Equity Capital Markets Group team at SunTrust Robinson Humphrey provides companies practical, experienced advice regarding the opportunities and complexities presented by today's equity financing options. The Group's purpose is to deliver a complete array of public and private equity offering and repurchase solutions. The team has helped clients raise more than $130 billion through nearly 400 equity and equity-linked offerings over the past five years.

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Mergers & Acquisitions

We advise owners on their most critical and complex business issues. Our Mergers & Acquisitions Group offers a full range of advisory services to help you develop and execute successful M&A strategies that are well aligned with your company's strategic corporate objectives. We are recognized as a top provider for deals under $500 million and have executed hundreds of transactions for private and public companies, as well as financial sponsor firms, across a wide variety of industries and market capitalizations.

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Syndicated & Leveraged Finance

Securing the most appropriate financing solutions requires a banking partner that can provide the expertise, flexibility and broad capabilities to deliver cost-efficient capital and outstanding execution. Our Syndicated & Leveraged Finance Group offers a full-service leveraged finance platform to help clients efficiently raise capital through a wide range of products and are noted for innovative transactions that are tailored to meet clients' specific needs.

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Capital Structure Advisory

Our Capital Structure Advisory team provides expert advice in Ratings Advisory, Liability Management, Restructuring and Distressed Advisory. We combine this deep product knowledge with SunTrust's industry and capital markets expertise to evaluate a client's full range of strategic alternatives.

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We have helped clients complete successful transactions across nearly every industry, offering specialized insights into core sectors such as consumer and retail, energy and power, financial services, financial sponsors, healthcare, industrials, media and communications, real estate and technology and business services.

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Asset Finance Solutions
Equity Capital Markets
Mergers & Acquisitions
Syndicated & Leveraged Finance
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Corporate Banking Solutions

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Credit & Financing

A dependable banking partner can provide the funds you need to manage your business and drive new growth opportunities. We offer a full array of secured and unsecured funding solutions, from simple credit lines to complex, more specialized financing strategies, including appropriate risk mitigation products.

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Asset Based Lending

Borrowing money against company assets can help you generate liquidity to raise capital or create greater operating flexibility with generally few or no financial covenants, including higher balance sheet leverage. Our Asset Based Lending Group provides debt capital solutions of $10 million or more to our commercial, corporate and investment banking clients through customized funding solutions across the credit spectrum.

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Equipment Finance

We offer a full array of taxable and non-taxable structures to provide you with customized, cost-effective financing solutions to help with capital conservation, cash flow management, asset flexibility and tax benefits.

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Financial Risk Management

The Financial Risk Management team works with SunTrust's clients to help manage market risks so they can place their focus on growing their business. The team takes the time to get to know its clients in order to deliver customized hedging solutions for interest rate, commodity, and currency risks.

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Treasury Management

Our experienced professionals listen to your unique business goals and objectives to help you manage your cash flow more effectively, reduce costs, increase control, and maximize the productivity of your staff. From payables to receivables, and online access to effective funds management, SunTrust offers the tools and advice to help you manage your working capital.

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Commercial Real Estate

SunTrust Commercial Real Estate is the place where opportunities and solutions meet for commercial real estate clients. Our five areas of focus; Regional Commercial Real Estate, Real Estate Investment Trust Banking, Institutional Real Estate, SunTrust Co

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Corporate Banking

- Credit & Financing
- Asset Based Lending
- Equipment Finance
- Financial Risk Management
- Treasury Management
- Commercial Real Estate

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404.926.5000

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3333 Peachtree Road Northeast
Atlanta, GA 30326

About SunTrust Robinson Humphrey

As a SunTrust Robinson Humphrey client, you will find that we are focused on becoming your company's trusted strategic and financial advisor through a highly personalized approach and integrated corporate and investment banking platform, which focuses on putting your company's needs above all else.

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