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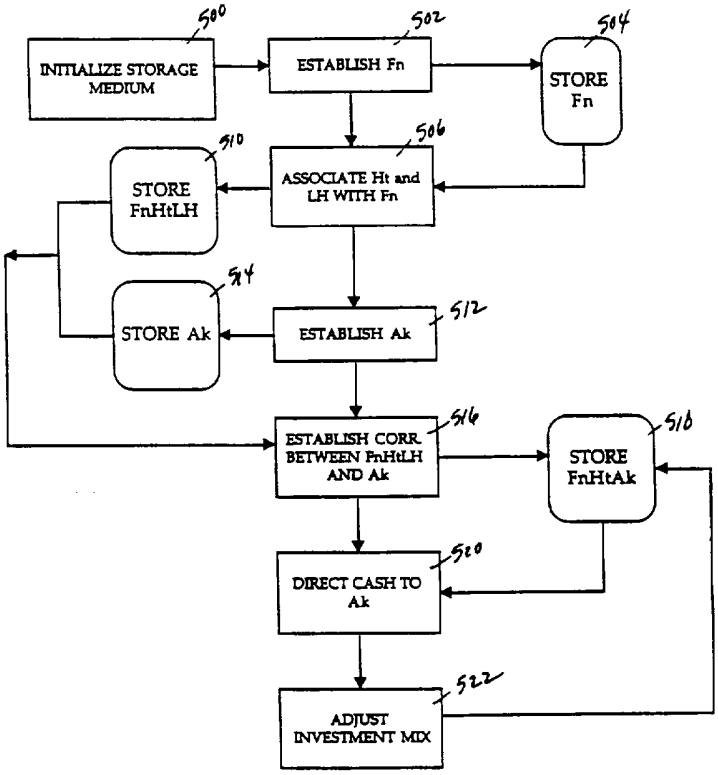
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(54) Title: INVESTMENT FUND MANAGEMENT METHOD AND SYSTEM

(57) Abstract

Method and system for management fund over a specified life, or time horizon Ht, for that fund. Generally, the system includes an investment fund Fn (502) having a fixed time horizon HT and an associated length to horizon LH (506). The fund Fn (502) includes several investment assets Ak (514), which may be contained within investment portfolios (Pm), which meet some criteria defining predetermined asset characteristics. Cash is directed to selected ones of the assets, or portfolios, to establish an investment mix for the investment fund Fn (502). An important aspect of the investment is adjustment of the investment mix (522) in accordance with some criteria related to the time horizon (Ht), preferably related to the diminishing length to horizon LH (506), of the investment fund Fn (502). Thus, as the investment fund matures, the investment mix is changed.



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INTERNATIONAL SEARCH REPORT

International application No.
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A. CLASSIFICATION OF SUBJECT MATTER

IPC(6) :G06F: 17/00; 19/00
US CL :364/ 401, 402, 406, 408
According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 364/ 401, 402, 406, 408

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
Y	US, A, 4,752,877 (Roberts et al.) 21 June 1988, see entire document.	1-29
Y	US, A, 4,953,085 (Atkins) 28 August 1990, see entire document.	1-29

☐ Further documents are listed in the continuation of Box C. ☐ See patent family annex.

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