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(54) Title: CONSOLIDATED SALES, MARKETING, AND CUSTOMER SUPPORT SYSTEM FOR FINANCIAL PRODUCTS

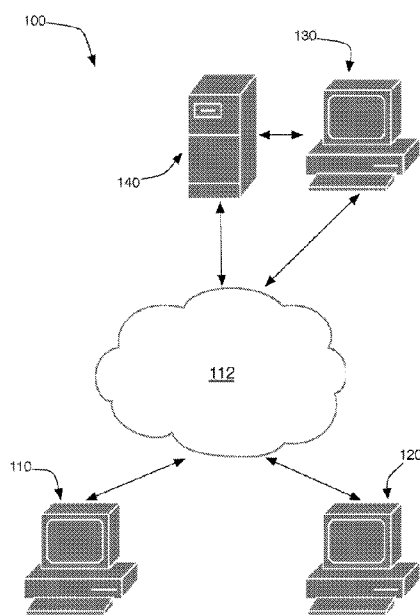


FIG. 1

(57) Abstract: A method includes accepting financial product information through a provider computer; accepting advisor information and client information; allowing access to a portion of the financial product information, based on the client information, through a client computer; allowing access to another portion of the financial product information not accessible through the client computer, based on the advisor information, through an advisor computer; and tracking and reporting the advisor information and the client information through metrics.



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INTERNATIONAL SEARCH REPORT

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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)

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

Korean utility models and applications for utility models
Japanese utility models and applications for utility models
(Chinese Patents and application for patent)

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

eKOMPASS(KIPO internal) & Keywords: financial, product, fund, advisor, metric, client

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	KR 10-2001-0000370 A (Lee Won Hi) 05 January 2001 See the whole document	1-20
A	KR 10-0430969 B1 (Dongbu DIS. INC) 12 May 2004 See the whole document	1-20
A	US 2001-0042037 A1 (KENDRICK W. KAM et al.) 15 November 2001 See the whole document	1-20
A	US 2007-0208645 A1 (MARK HOFFMAN et al.) 06 September 2007 See the whole document	1-20

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

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Information on patent family members

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Patent document cited in search report	Publication date	Patent family member(s)	Publication date
KR 10-2001-0000370 A	05.01.2001	None	
KR 10-0430969 B1	12.05.2004	None	
US 2001-0042037 A1	15.11.2001	None	
US 2007-0208645 A1	06.09.2007	US 7249080 B1	24.07.2007