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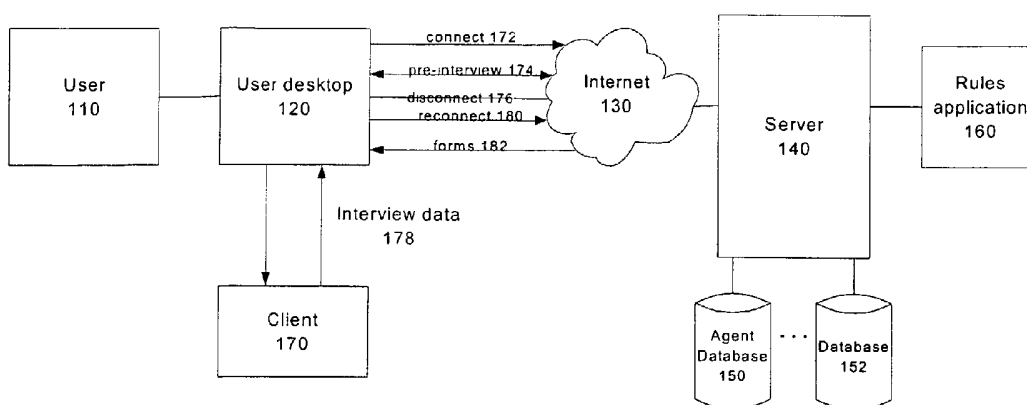
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(54) Title: METHOD AND SYSTEM FOR GENERATING ELECTRONIC FORMS FOR PURCHASING FINANCIAL PRODUCTS



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(57) Abstract: The invention provides system and method for generating electronic forms for purchasing a financial product, such as a variable annuity (Figure 1). A user accesses a web-based application for pre-interview data entry. Templates are used to format to information to be gathered from a client. At the end of the interview, the application may transmit data to a server to generate forms based on interview data.



For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

INTERNATIONAL SEARCH REPORT

International application No.

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A. CLASSIFICATION OF SUBJECT MATTER		
IPC(7) : G06F 17/60 US CL : 705/36		
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. : 705/36		
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) Please See Continuation Sheet		
C. DOCUMENTS CONSIDERED TO BE RELEVANT		
Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
Y, E	US 2003/0018481 A1 (ZHOU et al) 23 January 2003 (23.01.2003), whole document.	1-36
Y, E	US 2002/0133440 A1 (CHALKE et al) 19 September 2002 (19.09.2002), whole document.	1-36
<input type="checkbox"/> Further documents are listed in the continuation of Box C. <input type="checkbox"/> See patent family annex.		
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Name and mailing address of the ISA/US Mail Stop PCT, Attn: ISA/US Commissioner for Patents P.O. Box 1450 Alexandria, Virginia 22313-1450 Facsimile No. (703)305-3230		Authorized officer Vincent A Millin Telephone No. (703) 308-0956

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Continuation of B. FIELDS SEARCHED Item 3:

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