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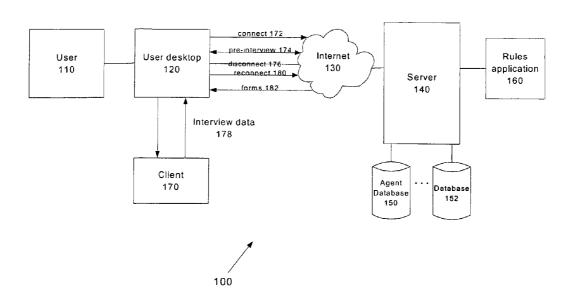
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(54) Title: METHOD AND SYSTEM FOR GENERATING ELECTRONIC FORMS FOR PURCHASING FINANCIAL PROD-**UCTS**



(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.



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INTERNATIONAL SEARCH REPORT

International application No.

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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* Ca	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					
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. * Special categories of clad documents: "A" document defining the general state of the art which is not considered to be of particular relevance. "See patent family annex. * special categories of clad documents: "A" document defining the general state of the art which is not considered to be of particular relevance. "See patent family annex. "T" later document published after the international filing date or pricity date and not in conflict with the application to act inside to understand the principle or theory underlying the invancion connot be considered to one of particular relevance; the claimed invancion connot be considered to involve an inventive to when the document is considered to involve an inventive to when the document is considered to involve an inventive to when the document is considered to involve an inventive and the published prior to the international filing date but later than the papiting of the international search report "A" document referring to an oral disciousre, use, exhibition or other mean document in patients are claimed. Date of the actual completion of the international search 19 June 2003 (19.06.2003) Name and mailing address of the ISA/US Mail Step PCT. Alm ISA/US Commissioner for Patents P.O. Box 1450 Telephone No. (703) 308-0956	Minimum documentation searched (classification system followed by classification symbols)					
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