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(12) **United States Patent**
Samson

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(54) **INVESTMENT GUIDANCE SYSTEM WHICH ENABLES INDIVIDUALS TO RATE AND SELECT ASSETS BASED ON PERSONAL INVESTMENT PREFERENCES**

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(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 3803 days.

(21) Appl. No.: **09/766,277**

(22) Filed: **Jan. 19, 2001**

(51) **Int. Cl.**
G06Q 40/00 (2012.01)

(52) **U.S. Cl.**
USPC **705/36 R; 705/35; 705/37; 235/379**

(58) **Field of Classification Search** 705/36 R,
705/37, 35, 1; 235/379
See application file for complete search history.

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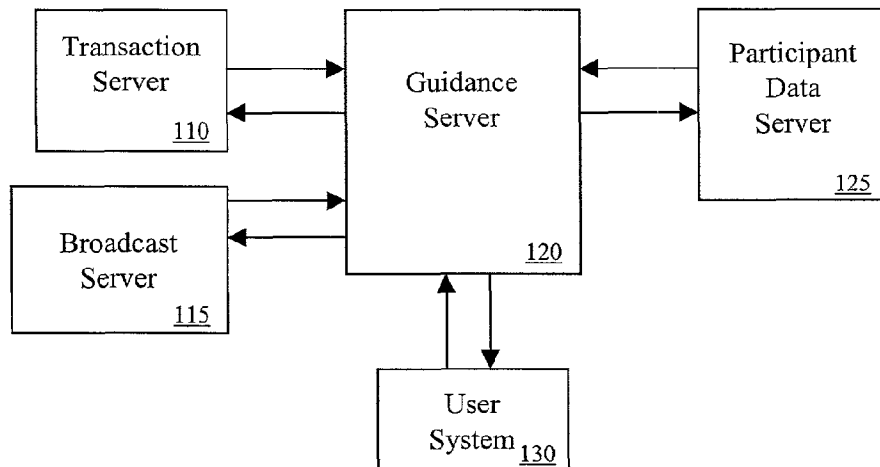
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(57) **ABSTRACT**

An investment guidance system which enables individuals to rate and select assets based on personal investment preferences. The system comprises a method for receiving a request to rate a plurality of assets, providing two or more criteria associated with the assets for a user to evaluate, receiving a relative weight of importance for the two or more criteria, and determining a rating for each asset based on the relative weights assigned to the two or more criteria. The system then ranks the plurality of assets based on the rated value for each asset, provides a list of the ranked assets and receives requests to execute trades for the ranked assets. The assets can comprise mutual funds, stocks, bonds, and/or other investment vehicles.

13 Claims, 10 Drawing Sheets



Investment Guidance System 100

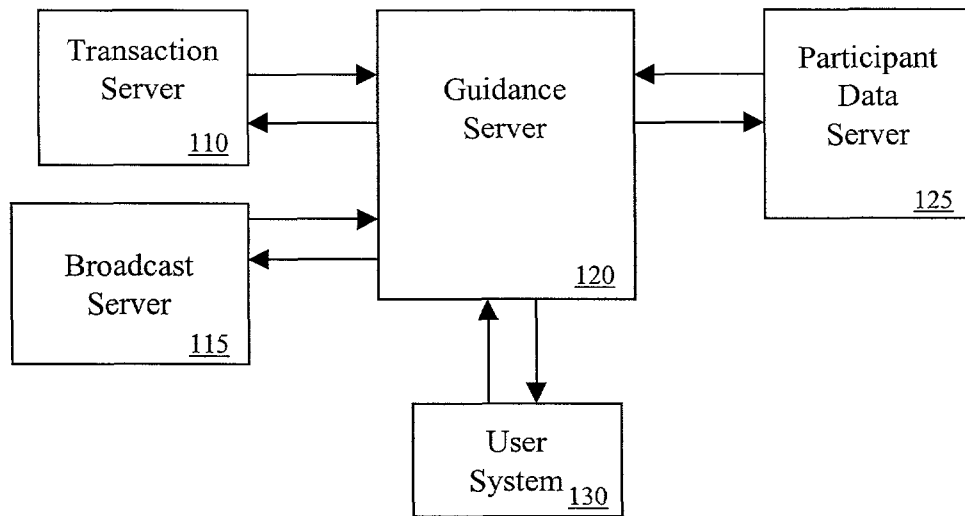


FIG. 1

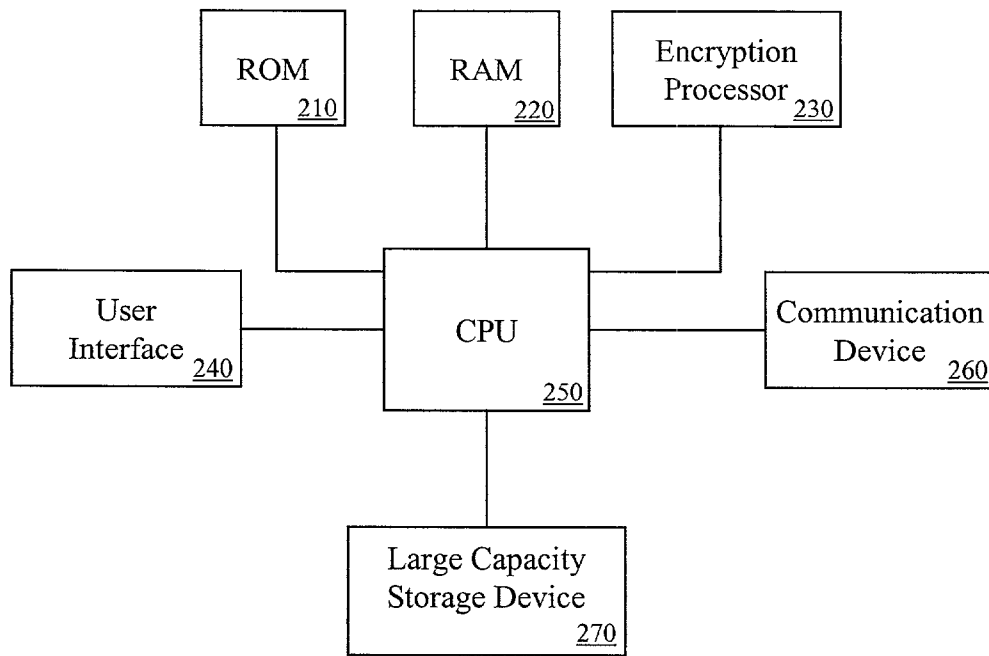


FIG. 2

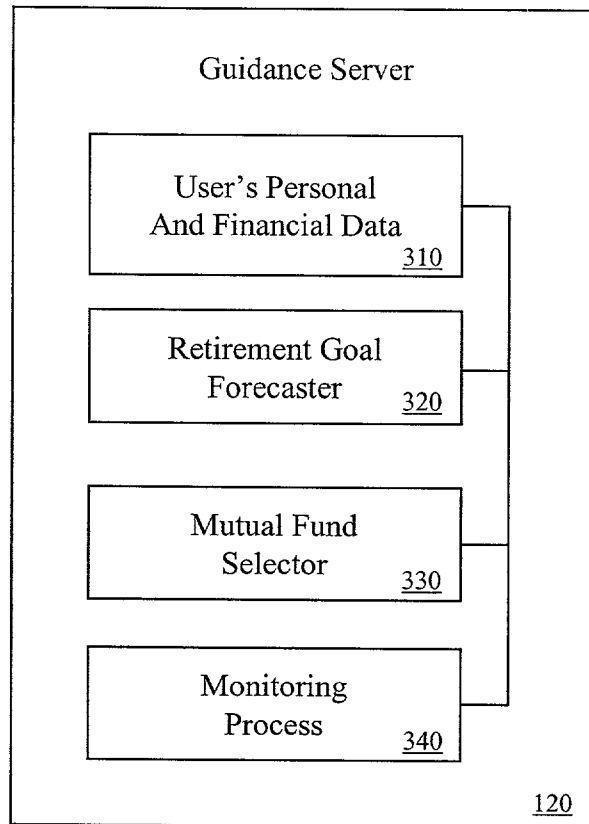


FIG. 3

Robert K. Samson

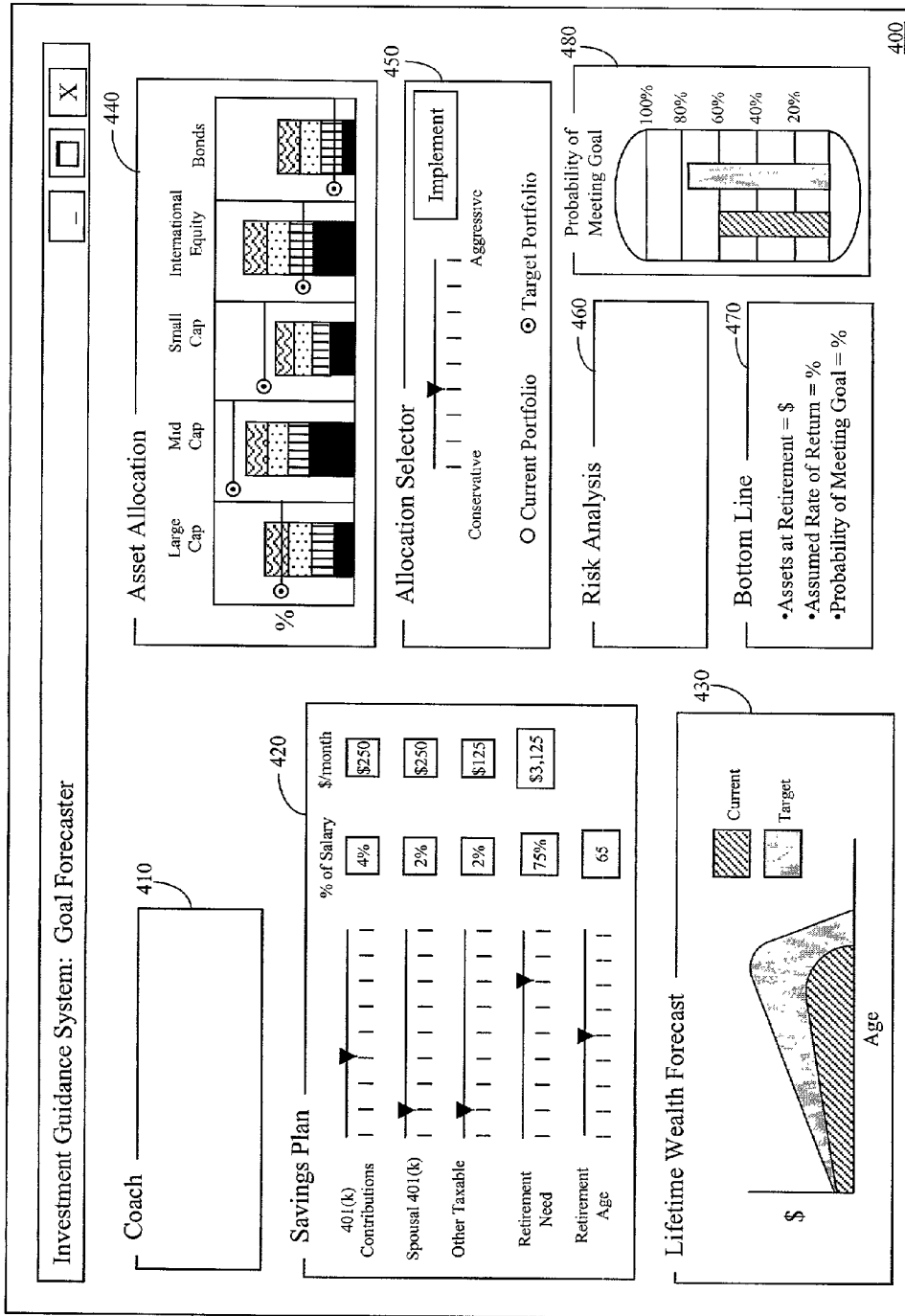


FIG. 4

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