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Results of Search in US Patent Collection db for:

CCL/705/36T: 68 patents.

Hits 1 through 50 out of 68

Final 18 Hits

Jump To

Refine Search

PAT. NO.	Title
1	7,398,239 T E-commerce sales and use tax exchange system and method
2	7,386,495 T System and method for processing tax codes by company group
3	7,376,609 T Maximization of a hedged investment budget for an index-linked insurance product
4	7,337,141 T Hedging employee stock options
5	7,330,831 T System and method for multiple account single security trading
6	7,328,183 T Computer program and method for determining the economic impact of long-term care
7	7,321,870 T System and method for providing financial services to high net worth individuals
8	7,305,353 T System and method for forecasting tax effects of financial transactions
9	7,249,075 T System and method for administering principal protected equity linked financial instruments
10	7,219,079 T Convertible financial instruments with contingent payments
11	7,197,484 T Asset management advice system and recording medium containing program of the system
12	7,177,831 T System and method for selecting and purchasing stocks via a global computer network
13	7,165,044 T Investment portfolio tracking system and method

- 14 [7,149,713](#) **T** [System and method for automating investment planning](#)
- 15 [7,124,105](#) **T** [Cash flow optimization using a genetic algorithm](#)
- 16 [7,117,176](#) **T** [Method and apparatus for enabling individual or smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis](#)
- 17 [7,117,175](#) **T** [Method and apparatus for managing a virtual mutual fund](#)
- 18 [7,110,971](#) **T** [Method and apparatus for enabling individual or smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis](#)
- 19 [7,107,239](#) **T** [Further improved system and methods for computing to support decomposing property into separately valued components](#)
- 20 [7,096,195](#) **T** [Method for enhancing the equity of a business entity](#)
- 21 [7,047,217](#) **T** [Computerized system and method for optimizing after-tax proceeds involving options](#)
- 22 [7,031,937](#) **T** [Method and apparatus for tax efficient investment management](#)
- 23 [7,031,935](#) **T** [Method and system for computing path dependent probabilities of attaining financial goals](#)
- 24 [7,016,871](#) **T** [System for and method of variable annuity contract administration](#)
- 25 [6,996,539](#) **T** [Method and apparatus for enabling smaller investors or others to create and manage a portfolio of securities or other assets or liabilities on a cost effective basis](#)
- 26 [6,988,082](#) **T** [Computerized systems and methods for facilitating the flow of capital through the housing finance industry](#)
- 27 [6,988,081](#) **T** [Automated methods and apparatus for programmed periodic replenishment of principal with annual adjustment to future interest rates](#)
- 28 [6,985,880](#) **T** [Method of risk management and of achieving a recommended asset allocation and withdrawal strategy, and computer-readable medium, apparatus and computer program thereof](#)
- 29 [6,963,852](#) **T** [System and method for creating a defined benefit pension plan funded with a variable life insurance policy and/or a variable annuity policy](#)
- 30 [6,832,209](#) **T** [Method and apparatus for tax-efficient investment using both long and short positions](#)
- 31 [6,772,128](#) **T** [Nuclear decommissioning insurance financial product and method](#)
- 32 [6,687,681](#) **T** [Method and apparatus for tax efficient investment management](#)
- 33 [6,684,189](#) **T** [Apparatus and method using front-end network gateways and search criteria for efficient quoting at a remote location](#)
- 34 [6,625,582](#) **T** [Method and system for converting a designated portion of future social security and other retirement payments to current benefits](#)
- 35 [6,611,808](#) **T** [Method and apparatus for determining additional benefits and costs for an annuity contract](#)
- 36 [6,609,111](#) **T** [Method and apparatus for modeling and executing deferred award](#)

- [instrument plan](#)
- 37 [6,578,016](#) **T** [Tax advantaged transaction structure \(TATS\) and method](#)
- 38 [6,567,790](#) **T** [Establishing and managing grantor retained annuity trusts funded by nonqualified stock options](#)
- 39 [6,516,303](#) **T** [Method, system, and apparatus for managing taxable events within a portfolio](#)
- 40 [6,473,737](#) **T** [System, method and apparatus for providing an executive compensation system](#)
- 41 [6,470,321](#) **T** [System, method, and computer program product for providing financial protection of equity investments](#)
- 42 [6,415,270](#) **T** [Multiple auction coordination method and system](#)
- 43 [6,411,939](#) **T** [Computer-aided method, machine, and products produced thereby, for illustrating a replacement of a benefit plan that is viable at one location but not viable at the location of the replacement](#)
- 44 [6,343,272](#) **T** [System for analyzing and managing equity participation life insurance and annuity contracts](#)
- 45 [6,342,272](#) **T** [Multi-layer corrosion resistant coatings](#)
- 46 [6,304,859](#) **T** [System and method for premium optimization and loan monitoring](#)
- 47 [6,298,333](#) **T** [Use tax optimization process and system](#)
- 48 [6,292,788](#) **T** [Methods and investment instruments for performing tax-deferred real estate exchanges](#)
- 49 [6,235,176](#) **T** [Computer apparatus and method for defined contribution and profit sharing pension and disability plan](#)
- 50 [6,161,098](#) **T** [Method and apparatus for enabling small investors with a portfolio of securities to manage taxable events within the portfolio](#)
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Hits 51 through 68 out of 68

Prev. 50 Hits

Jump To

Refine Search

ccl/705/36T

PAT. NO.	Title
51 6,161,096	T Method and apparatus for modeling and executing deferred award instrument plan
52 6,115,697	T Computerized system and method for optimizing after-tax proceeds
53 6,108,641	T Integrated nested account financial system with medical savings subaccount
54 6,064,983	T System for performing tax computations
55 6,058,376	T Process for evaluating the financial consequences of converting a standard form I.R.A. to the Roth form I.R.A.
56 6,044,352	T Method and system for processing and recording the transactions in a medical savings fund account
57 6,041,304	T System and method for controlling the cash value growth of an insurance policy
58 5,991,744	T Method and apparatus that processes financial data relating to wealth accumulation plans
59 5,966,693	T Method for combining loan with key employee life insurance
60 5,911,135	T System for managing financial accounts by a priority allocation of funds among accounts
61 5,907,828	T System and method for implementing and administering lender-owned credit life insurance policies
62 5,903,879	T Method of managing a loan for funding a pension
63 5,819,230	T System and method for tracking and funding asset purchase and insurance policy
64 5,806,042	T System for designing and implementing bank owned life insurance (BOLI) with a reinsurance option
65 5,802,500	T System and method for computing a financial projection of a prefunding program for other postretirement employee benefits under FASB statement 106
66 5,752,236	T Life insurance method, and system
67 5,590,037	T Digital computer system and methods for computing a financial

[projection and an illustration of a prefunding program for an employee benefit](#)

68 5,136,502 **T** [System for funding, analyzing and managing health care liabilities](#)

