

US PATENT & TRADEMARK OFFICE

PATENT APPLICATION FULL TEXT AND IMAGE DATABASE

ccl/705/36T

PUB. APP. NO.	Title
1 20090112635	Foreign Non-Qualified Deferred Compensation Hybrid Trust Strategy
2 20090106169	METHOD FOR ENABLING AMERICAN INDIAN TRIBES TO ATTRACT EQUITY CAPITAL INVESTMENT
3 20090094171	SYSTEM AND METHOD FOR MAXIMIZING AFTER-TAX INCOME USING SPLIT METHOD CHARITABLE REMAINDER TRUSTS
4 20090094170	METHODS AND SYSTEMS FOR FINANCIAL ACCOUNT MANAGEMENT
5 20090083197	PROPERTY INVESTMENT INSTRUMENT, SYSTEM, METHOD, PRODUCT, AND APPARATUS
6 20090070275	FINANCIAL OPTIMIZATION SYSTEM AND METHOD
7 20090063366	Multi-Basket Structure for Exchange Traded Fund (ETF)
8 20090037347	METHOD AND APPARATUS FOR OFFERING, PRICING, AND SELLING SECURITIES OVER A NETWORK
9 20090024541	POWER PURCHASE METHODS, AGREEMENTS AND FINANCIAL INSTRUMENTS FOR TAX-ADVANTAGED FINANCING RESIDENTIAL RENEWABLE ENERGY EQUIPMENT
10 20090018974	MANAGING INVESTMENT ASSETS
11 20080294574	TAX MANAGED BUY-WRITE FUND
12 20080243722	Method and process for facilitating donations via debt instruments
13 20080215572	METHOD AND APPARATUS FOR EVALUATING EQUIPMENT LEASES
14 20080195558	Combined 1031/1033 Property Exchange
15 20080189224	COMPUTERIZED SYSTEM AND METHOD FOR DETERMINING RETIREMENT WITHDRAWALS
16 20080177677	Non profit fund raising methodologies with grant of options
17 20080140457	RISK SHIFTING METHOD FOR INVESTMENTS IN WIND POWER GENERATION
18 20080126270	SYSTEM FOR AND METHOD OF RISK MINIMIZATION AND ENHANCED RETURNS IN AN INTELLECTUAL CAPITAL BASED VENTURE INVESTMENT

- 19 [20080114705](#) [Springing real estate mortgage investment conduit](#)
- 20 [20080082431](#) [Method and system for managing foreign investment tax refunds](#)
- 21 [20080071704](#) [PC experience](#)
- 22 [20080071703](#) [Tax resolution process and system](#)
- 23 [20080033860](#) [SYSTEM AND METHOD FOR FORECASTING TAX EFFECTS OF FINANCIAL TRANSACTIONS](#)
- 24 [20080005040](#) [Real estate transaction method](#)
- 25 [20070299762](#) [Structuring method and associated modelling software for the syndication of federal low-income housing tax credits generated by mixed-income tax-exempt bond financed low-income housing tax credits projects.](#)
- 26 [20070299761](#) [Real Estate Investment Techniques](#)
- 27 [20070282761](#) [SYSTEM AND METHOD TO CALCULATE TAX LIABILITY OF A FOREIGN ENTITY](#)
- 28 [20070271168](#) [Investment structure for tax-exempt and tax deferred investors](#)
- 29 [20070226154](#) [METHOD INTEGRATING ANNUITIES, MORTALITY CONTINGENT BONDS AND DERIVATIVES, FOR BENEFITING CHARITABLE ORGANIZATIONS](#)
- 30 [20070226117](#) [Certification program to facilitate the aquisition of investment personal property](#)
- 31 [20070208646](#) [BUSINESS YIELD-ENHANCEMENT TRUST](#)
- 32 [20070208645](#) [Investment advice systems and methods](#)
- 33 [20070203819](#) [SYSTEM, METHOD, APPARATUS AND PRODUCT FOR USE IN ASSOCIATION WITH TRANSACTIONS](#)
- 34 [20070198390](#) [SYSTEM AND METHOD FOR MULTI-STATE TAX ANALYSIS](#)
- 35 [20070185803](#) [Incentive Programs For Healthcare Cards](#)
- 36 [20070185802](#) [Incentive Programs For Healthcare Cards](#)
- 37 [20070185801](#) [Healthcare Card Incentive Program For Multiple Users](#)
- 38 [20070185800](#) [Spending Account Systems and Methods](#)
- 39 [20070185799](#) [Spending Account Systems and Methods](#)
- 40 [20070174170](#) [Combined 1031-1033 Exchange](#)
- 41 [20070168274](#) [System and method for financial management of advance earned income credit](#)
- 42 [20070156564](#) [Tax reporting system and method](#)
- 43 [20070106592](#) [METHOD AND APPARATUS FOR COLLECTION OF PERSONAL INCOME TAX INFORMATION](#)
- 44 [20070088582](#) [FINANCIAL METHODS USING A CHARITABLY INTEGRATED BUSINESS OPERATION](#)

45	20070083455	System and method for automating investment planning
46	20070055605	Pension plan designs and methods for eliminating potentially age discriminatory accruals from cash balance pension plans
47	20070043645	Structuring method and associated modelling software for the syndication of federal low-income housing tax credits generated by mixed-income tax-exempt bond financed low-income housing tax credit projects
48	20070033130	Distributed tax-return-preparation processing
49	20060080148	System and method for creating a retirement plan funded with a variable life insurance policy and/or a variable annuity policy
50	20060080147	Method of purchasing a product to avoid adverse selection
51	20060064367	Systems and methods for insuring intellectual property holding companies
52	20060064332	Health cost calculator/flexible spending account calculator
53	20060026086	Industry specific business and tax management system
54	20060026085	Investment structure for tax-exempt and tax deferred investors
55	20060015426	Risk shifting method for investments in wind power generation
56	20050289036	Method for securitizing retail lease assets
57	20050256791	System and method for administering charitable funds through affiliations of professionals
58	20050234797	Principal retention options strategy computer support and method
59	20050234795	Investment transaction structure in which one party may substitute one investment for another
60	20050234794	Information technology value strategy
61	20050234793	Method and computer program for tax sensitive investment portfolio management
62	20050234747	System for funding, analyzing and managing life insurance policies funded with annuities
63	20050209959	Financial regime-switching vector auto-regression
64	20050203823	Method for encouraging extended holding periods of publicly traded equity shares
65	20050203822	System and method of using life insurance to generate income
66	20050197947	Method of converting delinquent assets to revenue or cash flow
67	20050192886	Method of evaluating an option spread
68	20050187852	Method and system for account reconciliation in a wealth

		<u>management system</u>
69	<u>20050171883</u>	<u>Method and system for asset allocation</u>
70	<u>20050171820</u>	<u>Process for creating a financial plan for funding of college education</u>
71	<u>20050149422</u>	<u>System for optimizing the return of an investment portfolio, using a method of multiple share combinations</u>
72	<u>20050144110</u>	<u>Automatically allocating and rebalancing discretionary portfolios</u>
73	<u>20050137967</u>	<u>Equity based incentive compensation plan computer system</u>
74	<u>20050137954</u>	<u>Reduced-risk income producing equity method</u>
75	<u>20050137953</u>	<u>Asset planning and tracking</u>
76	<u>20050137913</u>	<u>System and method for insuring against tax liabilities</u>
77	<u>20050131798</u>	<u>Method and system for administering the hedging of an employee deferred compensation plan using swaps</u>
78	<u>20050131794</u>	<u>Stock portfolio and method</u>
79	<u>20050131793</u>	<u>Automated tax cost basis</u>
80	<u>20050119962</u>	<u>Method and system for securitizing contracts valued on an index</u>
81	<u>20050114249</u>	<u>Method by which an individual can manage his own selected assets, receive the benefits from the selected assets and protect the selected assets from claimants</u>
82	<u>20050108136</u>	<u>System and method for creating, selling, and/or managing property funds in an investment market</u>
83	<u>20050097022</u>	<u>System and method for investment in a portfolio of entertainment productions</u>
84	<u>20050086156</u>	<u>Computer system for managing fluctuating cash flows</u>
85	<u>20050086148</u>	<u>Investment structures, methods and systems involving derivative securities</u>
86	<u>20050086147</u>	<u>System and method for increasing an amount of a security available for borrow</u>
87	<u>20050060209</u>	<u>Method and system for insuring longer than expected lifetime</u>
88	<u>20050027551</u>	<u>System and method for enabling self-employed people to work like hired employees in a united company while keeping autonomy and generating additional advantages</u>
89	<u>20050010481</u>	<u>Systems and methods for improving the liquidity and distribution network for illiquid items</u>
90	<u>20040243499</u>	<u>Method and system for providing enhanced stable value</u>
91	<u>20040243451</u>	<u>Shareholder-owned life insurance system and method</u>
92	<u>20040230505</u>	<u>Method and system for managing a non-qualified deferred compensation program using hedging</u>

- 93 [20040225536](#) [Superstructure pool computer system](#)
- 94 [20040210503](#) [Method for hedging one or more liabilities associated with a deferred compensation plan](#)
- 95 [20040199446](#) [Financing the donation of life insurance proceeds](#)
- 96 [20040181436](#) [Method and system of charitable fundraising and socially responsible investment involving life insurance products](#)
- 97 [20040177022](#) [Methods for issuing, distributing, managing and redeeming investment instruments providing securitized annuity](#)
- 98 [20040172304](#) [Apparatus and method for providing insurance products, services and/or coverage for leased entities](#)
- 99 [20040167812](#) [Counterparty arrangement and method for use in hedging and financial derivative transactions](#)
- 100 [20040148202](#) [Life Insurance Continuation Plan](#)
- 101 [20040117288](#) [Method for providing default protection in connection with a deferred compensation liability](#)
- 102 [20040088202](#) [Nuclear decommissioning insurance financial product and method](#)
- 103 [20040088201](#) [Method and system for financing future needs](#)
- 104 [20040059609](#) [System and methods for tracking the relative interests of the parties to an insurance policy](#)
- 105 [20040019506](#) [Method and system for generating endowment for a tax-exempt organization](#)
- 106 [20030204462](#) [Method and system for administering the hedging of an employee deferred compensation plan using swaps and options](#)
- 107 [20030182147](#) [Web-based processing system for non-qualified benefits record keeping](#)
- 108 [20030144947](#) [Computer-based system for hedging and pricing customized basket exchange swaps](#)
- 109 [20030139992](#) [Method of creating financial structure for delivering a tax favored financial position](#)
- 110 [20030139987](#) [Method of creating financial structure for delivering a tax favored financial position](#)
- 111 [20030120518](#) [Method for providing an insured result for section 1031 exchanges](#)
- 112 [20030110061](#) [Simplified variable life insurance](#)
- 113 [20030105652](#) [System, method, and computer program product for managing an investment to increase the after-tax death benefit of the investment](#)
- 114 [20030093354](#) [Method for hedging one or more liabilities associated with a deferred compensation plan and for recordkeeping information of such a hedge](#)
- 115 [20030083972](#) [Methods for issuing, distributing, managing and redeeming investment instruments providing securitized annuity options](#)
- 116 [20030033172](#) [Method and system for converting an annuity fund to a life insurance](#)

policy

- 117 [20030033171 Nuclear decommissioning insurance financial product and method](#)
 - 118 [20030014351 Electronic bartering system with facilitating tools](#)
 - 119 [20020194136 Hedging employee stock options](#)
 - 120 [20020174044 Method for hedging one or more liabilities associated with a deferred compensation plan](#)
 - 121 [20020165740 Investment style life insurance product that allows consumer to control and replace individual policy components](#)
 - 122 [20020147617 Health cost calculator/flexible spending account calculator](#)
 - 123 [20020143682 Method of ascertaining an efficient frontier for tax-sensitive investors](#)
 - 124 [20020087365 System for funding, analyzing and managing life insurance policies funded with annuities](#)
 - 125 [20020059127 Method and apparatus for tax efficient investment management](#)
 - 126 [20020035533 System and method for processing like-kind exchange transactions](#)
 - 127 [20020013750 Methods and investment instruments for performing tax-deferred real estate exchanges](#)
 - 128 [20020004771 Employee deferred income system and method](#)
 - 129 [20010049612 Survivor's benefit plan](#)
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