Title (en)

DECISION ASSISTANCE PLATFORM CONFIGURED FOR FACILITATING FINANCIAL CONSULTING SERVICES

Title (de)

ZUR ERMÖGLICHUNG VON FINANZKONSULTATIONSDIENSTEN KONFIGURIERTE ENTSCHEIDUNGSHILFSPLATTFORM

Title (fr)

PLATE-FORME D'AIDE À LA PRISE DE DÉCISION CONÇUE POUR FACILITER L'UTILISATION DE SERVICES DE CONSULTATION FINANCIERS

Publication

EP 1984882 A4 20101124 (EN)

Application

EP 06720797 A 20060216

Priority

US 2006005364 W 20060216

Abstract (en)

[origin: WO2007106058A2] A system includes instructions configured for enabling the one or more data processing device to facilitate preparing client-specific template information and determining client-specific consulting information dependent upon the client-specific template information. The client specific template information includes performance criteria, weightings, defined investment dataset information, filters configured for refining investment dataset information and/or process instructions. Examples of client specific consulting information include investment index performance scores, performance scores of investments in an investment portfolio, objectively quantified investment choices, asset class corresponding to allocated investment within an investment portfolio, comparative performance analyses between allocated investments and non-allocated investments represented within an asset class, and other information utilized by an investor for making investment decisions.

IPC 8 full level

G06Q 40/00 (2012.01)

CPC (source: EP)

G06Q 40/06 (2013.01)

Citation (search report)
- No further relevant documents disclosed
- See references of WO 2007106058A2

Designated contracting state (EPC)

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Designated extension state (EPC)

AL BA HR MK YU

DOCDB simple family (publication)

WO 2007106058 A2 20070920; **WO 2007106058 A3 20090522**; AU 2006340069 A1 20070920; BR PI0621211 A2 20111206; CA 2641999 A1 20070920; CN 101529459 A 20090909; EP 1984882 A2 20081029; EP 1984882 A4 20101124; JP 2009527048 A 20090723; JP 5113083 B2 20130109; MX 2008010523 A 20081020

DOCDB simple family (application)

US 2006005364 W 20060216; AU 2006340069 A 20060216; BR PI0621211 A 20060216; CA 2641999 A 20060216; CN 200680052884 A 20060216; EP 06720797 A 20060216; JP 2008555209 A 20060216; MX 2008010523 A 20060216