System and Method for Funding an Account
and Consolidating Financial Relationships

ABSTRACT

The present invention is a method and system for providing for investments to be made on behalf of an individual by a financial institution based on the individual's overall relationship to the financial institution. The relationship consists of the number, types, and size of accounts the individual has with the financial institution and any other companies associated with the financial institution. In addition, the length of time the individual maintains any of the accounts is also considered in the relationship. The financial institution saves resources by retaining individual loyal to the financial institution with larger account amounts and then uses this savings to invest into an account that will increase in value over time so as to provide the individual with greater assets in the future.

Figure 1 to accompany the abstract upon publication.