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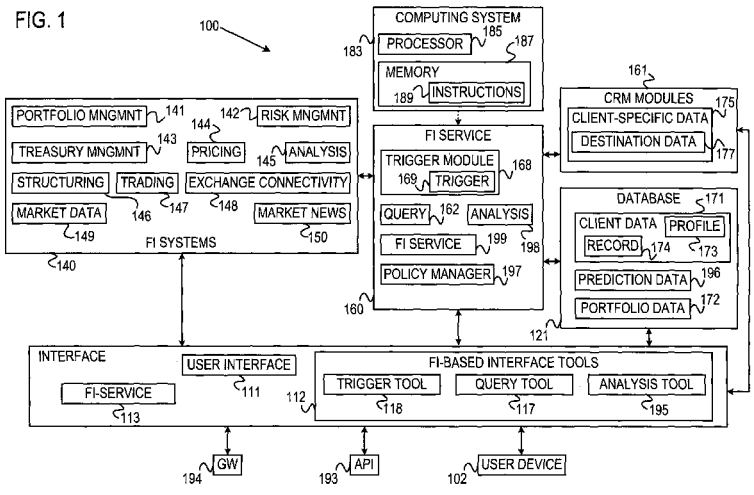
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(54) **Title**: DEVICE, SYSTEM, AND METHOD OF AUTOMATIC FINANCIAL-INSTRUMENT MANAGEMENT



(57) **Abstract**: Devices, systems, and methods of automatic Financial-Instrument (Fl) management In some embodiments, a system includes, a memory having stored thereon financial-instrument-based (Fl-based) management instructions, and a processor to execute the Fl- based management instructions resulting in a Fl-based management application which receives portfolio data corresponding to a plurality of financial instrument portfolios associated with a plurality of clients, wherein the Fl-based management application may automatically identify one or more portfolios of the plurality of portfolios satisfying at least one cnteπon for each identified portfolio The Fl-based management application may receive client-specific management data that includes at least client-specific destination information defining at least one destination and for each identified portfolio

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