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(54) Title: METHOD AND SYSTEM FOR AUTOMATED RULE-BASED ALLOCATIONS

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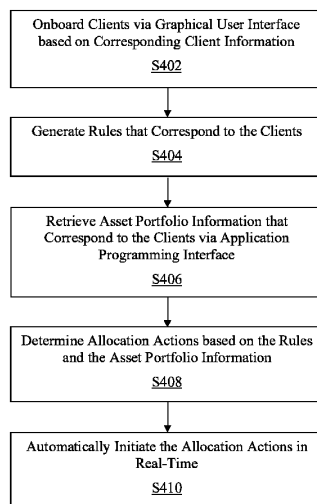


FIG. 4

(57) Abstract: A method for facilitating automated rule-based asset allocation is disclosed. The method includes onboarding, via a graphical user interface, clients based on corresponding client information; generating rules that correspond to the clients, the rules relating to asset allocation rules; retrieving, via an application programming interface, asset portfolio information that corresponds to the clients; determining an allocation action based on the generated rules and the asset portfolio information; and automatically initiating, in real-time, the allocation action.

Declarations under Rule 4.17:

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- *as to the applicant's entitlement to claim the priority of the earlier application (Rule 4.17(iii))*

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