



US 20030105692A1

(19) **United States**

(12) **Patent Application Publication**  
**Gilbert et al.**

(10) **Pub. No.: US 2003/0105692 A1**

(43) **Pub. Date: Jun. 5, 2003**

(54) **INTERFACES IMPLEMENTING  
MANAGEMENT OF RETIREMENT  
ACCOUNTS OVER A NETWORK**

**Publication Classification**

(51) **Int. Cl.<sup>7</sup> ..... G06F 17/60**

(52) **U.S. Cl. .... 705/35**

(76) Inventor: **James A. Gilbert**, Los Angeles, CA  
(US)

(57) **ABSTRACT**

Correspondence Address:  
**LACASSE & ASSOCIATES, LLC**  
**1725 DUKE STREET**  
**SUITE 650**  
**ALEXANDRIA, VA 22314 (US)**

A plurality of specialized interfaces interact with a plurality of specialized gateways to provide plan provider representatives, plan sponsor representatives, and plan participants with access to a network-based retirement funds management system, wherein the interfaces assist in the real-time or near real-time management of retirement funds. The interfaces include at least the following: a plan provider interface (providing authorized plan provider representatives with access to plan provider gateway), a plan sponsor interface (providing authorized plan sponsor representatives with access to plan sponsor gateway), and a plan participant interface (providing plan participant with access to plan participant gateway).

(21) Appl. No.: **10/197,677**

(22) Filed: **Jul. 18, 2002**

**Related U.S. Application Data**

(60) Provisional application No. 60/305,889, filed on Jul. 18, 2001.

