



(12) **United States Patent**  
**Amarasingham et al.**

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(54) **CLIENT MANAGEMENT TOOL SYSTEM AND METHOD**

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(\*) **Notice:** Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 665 days.

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(58) **Field of Classification Search**  
 None  
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(57) **ABSTRACT**

A client management tool system comprises a gateway module configured to provide access to a data store storing client and non-client data, a collection of computerized question forms configured to obtain additional data about a client, a social data model defining a structure to store and organize the client data, a predictive model including a plurality of weight variables and thresholds for consideration of the client data to identify needs of the client and a valuation of services to address the client needs, a knowledge base of available programs and service providers able to deliver the needed services, a client management module configured to provide recommended a course of action in response to the identified client needs, valuations, and available programs and services providers, and a data processor.  
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