



WealthEngine™

Our cutting edge wealth identification tools help you to *increase assets under management, improve client retention & prospect more effectively.*

With the best and most comprehensive wealth, business and philanthropic data available, you can depend on WealthEngine for smart wealth identification. Whether you want to do a quick search on a new prospect or review stock and other hard asset data on your clients, we deliver the information you need to stay informed and get ahead.

- ⚙ *Obtain hard asset securities, income, real-estate & biographical information from more than 25 public databases*
- ⚙ *Update securities data daily from previous day's market performance*
- ⚙ *Access facts based on disposable assets not demographic models*
- ⚙ *Identify the best, high-net-worth prospects in your area*
- ⚙ *Monitor important financial transactions through email alerts*
- ⚙ *Apply cutting edge technology to your marketing efforts*
- ⚙ *Create handy reporting and history logs*
- ⚙ *Expedite and simplify routine analyses on clients and prospects*
- ⚙ *Rely on our experienced staff—the best and brightest in the market*
- ⚙ *Use for key sales opportunities and networking—everyone from sales to compliance to executive services can benefit*



PRODUCTS & SERVICES

As the largest and fastest growing company in the industry, WealthEngine offers research products for companies of all sizes:

FindWealth Online—a web-based wealth identification tool with immediate results on individuals, companies and foundations. With each search more than 25 top databases are scanned for the latest information and then compiled into an easy to read, easy to print profile. You access valuable hard asset



FindWealth Online Profile

information like real estate, pension and income, as well as biographical and philanthropic data. Review securities information through Wealth ID's **Pinpoint** and stay informed on clients through **Dialog NewsRoom**, an email-based news alert service. You can also save results in your own online history archive and create folders for special groups like prospects and new clients. There is no wait; results are posted within seconds.

FindWealth Screening Services—for small to large numbers of client or prospect records. You provide a list to be screened (current clients or prospects) and WealthEngine returns the list with targets for your most promising prospects. WealthEngine combines superior data with an easy, intuitive interface that lets you group, cross-reference and analyze information quickly and efficiently. For each record, your data is appended with everything from personal demographic data to complete records of holdings, trades, options and Form 144 intention to sell information.

Our unique process, called **Loop Analysis**, runs your records through our data sources over and over again as each new piece of information is added to the profile leaving no missed detail. Uncover the hidden wealth in your database. Each screening gives validation for upselling and cross-selling opportunities:

Query—by name, city, state, company and by market values of stock and options.

- Identify low-level clients with far greater potential.

Full Profiles—of each matched record details biographical information as well as current stock ownership, dollar value of past stock sales, value of options (vested and non-vested) and annual dividends.

- Link spouses and children in your file to "insider" executives

Top Prospect Indices—quickly focus your efforts. Prospects are ranked by market value of stockholdings, past stock sales and net value of options.

Networking Reports—helps you identify personal links inside prospective companies and industries. These serve as a guide to the hidden, inner circle of "who knows who" among your clients and prospects.

- Cross-selling and upselling existing clients is much easier than establishing a new client relationship. WealthEngine uncovers these opportunities.



FindWealth Data

Banks, accounting firms, insurance companies, and brokerage houses all depend on Wealth-Engine to maximize their sales potential, protect their investments and better serve their clients.





Prospect Generator lets you set your own criteria for fast, customized prospecting

Prospect Generator—proprietary database of over 8M high-net-worth individuals. You set the criteria based on geographic area, net worth, properties owned, stock & options, etc. and download the results for instant prospecting, upselling and direct marketing opportunities.

WebConnect—link your FindWealth Screening results (provided in an Access Manager database) to your FindWealth Online Advanced Search Page. Your research is always seamless, fast and complete.

WebConnect for CRM—connect your CRM database to FindWealth Online for quick, timely research.

ProspectLink—application programming interface (API) that allows for a bi-directional flow of hard asset data to be updated directly in your CRM database. You can refresh existing information or import & save new data. This integrated solution will help drive workflow within your CRM.

WebExpress—offers ongoing screening services for companies with a regular influx of new prospects. Use WebExpress on a daily, weekly, monthly or quarterly basis.

FindWealth Online UK & FindWealth Screening UK—products specifically designed for research in the United Kingdom. With data sources exclusive to the UK, these tools are useful for international clients.



TOP DATA SOURCES



Decide with Confidence



The real estate information experts™

- Airplane Ownership
- Axiom Household Profiles
- Cascaid
- Charity Commission
- D&B Business
- D&B Executives at Home
- DataQuick Assessment & Real Property Sales
- Dialog News Alerts
- Experian
- Federal Election Commission Contributors
- GuideStar Foundation Trustees
- GuideStar Nonprofit Directors & Executives
- Hemscott
- IRS Section 527 Directors & Organizations
- JGA Charitable Donations
- LexisNexis Real Estate
- Marquis Who's Who Biographies
- National Physician Profiles
- Pension Data from Federal Form 5500
- Philanthropic Gifts
- POW&R Wealthy Individuals
- Reuters Market Guide Profiles
- Securities & Exchange Commission Filings
- Social Security Administration Master Death Index
- State Business Registrations
- State Political Donations
- Merchant Vessels of the USA (Boat Ownership)
- UK Airmen & Aircrafts
- Waltman Charitable Gifts
- Waltman Directors
- WealthEngine Charitable Donations
- WealthID Stock Information
- Zoominfo



NEXT STEPS

- 1) Contact WealthEngine at (800) 933-4446 or info@wealthengine.com for more information about our screening and online research tools. You will work with a sales representative who can help you determine which products are right for you.
- 2) Try a free, two day trial of FindWealth Online. Training prior to the trial lasts approx. 30 minutes and is conducted via telephone while at your computer. Subscriptions are generally offered on an annual basis with payment by credit card, check or via invoice.
- 3) Send in a test file for a FindWealth Screening. Review your results with your sales representative according to your timeframe.
- 4) Contract for FindWealth Screening Services and schedule training for you and your staff. Training may be conducted in person or via webinar.
- 5) Integrate findings in your customer relationship management system.
- 6) Use WealthEngine experts for conferences and staff trainings.



THE WEALTHENGINE DIFFERENCE

Unique, reliable information

Key data, services and reports unavailable through other vendors

Customized results

Buy only what you need and nothing more

Immediate response

Advanced technology that doesn't make you wait

Great training & customer support

We listen to you and focus on your needs...always



COMPANY BACKGROUND

WealthEngine.com's roots date back to 1991, when its predecessor company—Prospects of Wealth & Resources (POW&R)—began to serve non-profit and financial organizations with a revolutionary wealth identification tool. In early 2000, the entire company was overhauled and our products were redesigned to take advantage of new and promising research technologies.

Soon our internet-based research service, FindWealth Online, was launched to provide the financial services and nonprofit sectors with immediate access to some of the most well-known publicly available databases. By late 2000, POW&R completed its transformation and began doing business as WealthEngine.com.

In 2005, WealthEngine extended its programs to the United Kingdom to create the first international research vehicle through its FindWealth Online UK and associated screening service products. WealthEngine also merged with a leading research company, Wealth ID (formerly a division of Thomson Financial), to become the largest provider of database/technology solutions to the financial industry. Today, WealthEngine offers the broadest range and highest quality of data sources, the strongest technology and the most experienced staff in the industry.

Why not give us a try today?



4330 East-West Highway, Bethesda, MD 20814
Tel: 800-933-4446 Web: www.wealthengine.com
Email: info@wealthengine.com

