

## Raise more funds from existing donors and build a pipeline of qualified prospects with on-demand prospect research tools

Timing is everything when cultivating a donor or researching a new prospect. Using key wealth, biographical and philanthropic information can give you an edge when cultivating donors and estimating ask amounts. That's where prospect research comes in—for over 20 years, WealthEngine™ has been helping nonprofits of all sizes increase their overall fundraising effectiveness. In fact, over 2,500 organizations look to WealthEngine for their prospect research and screening needs.

Whether you are updating your prospect pipeline, responding to a leadership request for a quick donor profile, or identifying major gift prospects among special event registrants, FindWealth Online<sup>SM</sup> gives you reliable information in mere seconds. With an extensive range of data available, you can validate and act on fundraising initiatives with the speed and confidence to deliver real results.

### Key Features

- **Simple & Advanced search logic** compares all data sources
- **Relationship builders** show your prospect's Circle of Friends
- **Propensity to Give (P2G™)** segment as your donors
- **Charitable Donations** database
- **Foundation Search** contains a direct link to form 990s
- **Dialog NewsRoom™** with the ability to setup email alerts
- **Easy to use, print and export** to PDF or Word format
- **Integrate results** into 50 DMS and CRM databases
- **Federal and State Elections** donation records

### Valuable Data

By combining our extensive collection of data sources, WealthEngine gives you speed and simplicity in its flagship product. There is no need to sort through multiple data providers; FindWealth Online quickly generates reports detailing real estate ownership, other hard assets, philanthropic gifts, biographic profiles and social interests.

#### Key wealth identifiers include:

- **Giving Capacity** - giving capacity estimates for every individual in the database over a five year period
- **Assets** - income, real estate holdings, insider stock and options holdings, pension
- **Lifestyle** - do they own a plane or boat & details on each craft
- **Family & Biography** - age, family, home address, and vacation homes
- **Real Estate** - including mortgage (1<sup>st</sup> and 2<sup>nd</sup>), lender, taxes, sale dates and market, assessed values, home loan value and length of residence
- **Business** - where they work, sales, business history, business ventures
- **Philanthropic Giving** - who are they giving to, how much and when
- **Federal & State Election Contributions** - political affiliations, who are they giving to, how much and when
- **Family Foundations** - details on every family foundation in the U.S.

### Data Sources

- Acxiom Household Profiles
- Aircraft
- Airmen's Certificate
- Charitable Donations
- DataQuick Real Estate
- Dun & Bradstreet
- Dun & Bradstreet State Business Registrations
- Federal Election Commission Campaign
- Foundation Trustees
- GuideStar Directors
- GuideStar Foundations
- Hoovers Business Information
- IRS Pension Holders
- LexisNexis Real Estate
- Marquis Who's Who
- Merchant Vessels
- National Do Not Mail Registry
- National Physicians Profiles
- Philanthropic Donations
- Prospects of Wealth & Resources (POW&R)
- Reuters Market Guide Profiles
- Section 527 Directors
- Section 527 Political Contributions
- Social Security Master Death Index
- State Boat Registrations
- State Political Donations
- WealthID Securities

## Expand your research:

- **Foundation Search** - access 100,000 foundations, corporate gifts and grantmaking public charities. Includes geographical area, contact information, organizational NTEE codes and links to their Form 990.
- **Dialog NewsRoom™** - set up an email alert system to notify you when key donors and prospects are making news or research directly in the NewsRoom's portal of 11,000+ top news sources:
  - Trade, business and scholastic journals
  - Local newspapers
  - Regional business publications
  - National and international business newspapers
  - Industry newsletters
  - Broadcast transcripts
  - Corporate news releases

### Non-Profit Search

<b>Records to search:</b>	Foundations Only (990-PF) ▾
<b>Organization:</b>	<div style="border: 1px solid #ccc; padding: 2px;">                     Foundations Only (990-PF)                      Non-Profits Only (990)                      Any Type                 </div>
<b>City:</b>	<input type="text"/>
<b>State:</b>	Select From List ▾
<b>Zip Code:</b>	<input type="text"/>
<b>Assets:</b>	Any Amount ▾
<b>NTEE Code:</b>	Select From List
<div style="display: flex; justify-content: center; gap: 10px;"> <span style="background-color: #006633; color: white; padding: 5px 10px; border-radius: 3px;">Search</span> <span style="background-color: #006633; color: white; padding: 5px 10px; border-radius: 3px;">Reset</span> </div>	

## Robust Add-ons for Every Need

Strengthen the power of FindWealth Online with features that enhance your research, broaden prospecting capabilities and streamline workflows:

- **Pinpoint<sup>SM</sup>** - track key securities transactions (updated daily) and changes in financial position that create wealth opportunities in an online portfolio.
- **Prospect Generator<sup>SM</sup>** - create segmented lists of affluent prospects (by affiliation, geography, assets or analytics) with the greatest wealth, disposable income and inclination to give to your organization.
- **ProspectLink<sup>SM</sup> and WebConnect<sup>SM</sup>** - seamlessly integrate up to 60 data fields into your DMS to keep your screening data fresh and directly linked to gift data.
- **WebExpress<sup>SM</sup>** - screen small batches of records (special event attendees, grateful patients, freshman parents, etc.) with delivery into your FindWealth Online<sup>SM</sup> History Section.

## Client Support

WealthEngine has a reputation for providing knowledgeable client service. Our account managers will work with you to ensure that you get the training and ongoing support essential to success.

Included in every contract:

- **Free training** sessions offered weekly via webcast
- Ongoing free **webinars** on prospect research topics
- Online **Knowledgebase**
- **Best practice reports** and webcasts
- Blog and **social networking** community to facilitate dialogue

Contact us today at 800.933.4446 or [info@wealthengine.com](mailto:info@wealthengine.com) for more information. Simply put, prospect research is what we do. With over 20 years of experience and over 2,500 clients, we can deliver an immediate, results-oriented prospect research solution that supports your fundraising goals.