

Why Go in Circles When You Can Get Right to the Point?

Ever wonder which of your clients or prospects:

- Is a company insider with liquid assets?
- Has hard assets qualifying for upsell or cross selling programs?
- Sells or makes a transaction on some of their stock holdings?

WealthEngine's Pinpoint product provides key securities and hard asset information on corporate insiders in an online portfolio. Build a portfolio of your clients and prospects and track their trading activity on direct and indirect holdings.

Together with FindWealth's suite of products, you can quickly manage and track your top prospects based on insider trading information and more than 35 information rich databases, including access to our Dialog NewsRoom and Foundation Search through FindWealth Online. With these resources you can review news-worthy happenings on individuals, companies or foundations and have a direct link to their Form 990.

Instant Online Access Means You Can:

Track changes in financial position (through portfolio monitoring)

Monitor transactions with automatic email alerts about trades and transactions

Access direct links to Security & Exchange Commission (SEC) filings which are updated daily

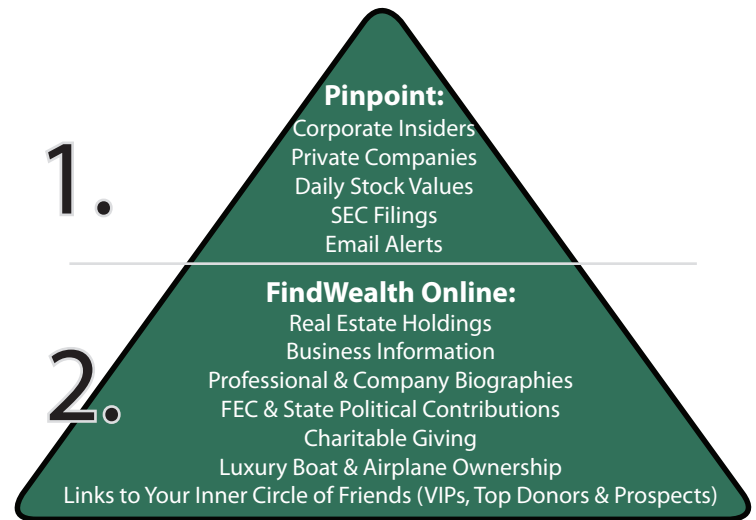
Research prospects for assets, board affiliation, company insider status and relationships

Segment & Save prospects easily with the intuitive interface

Export contact info or summary data as CSV or Excel files

Act on hard data you can segment based on real facts

Levels of Detail From WealthEngine



Fast. Intuitive. Essential.

Pinpoint gets you right to the point of securities information and gives you the edge to make your qualification efforts successful.

It's a necessary addition to FindWealth Online if you are prospecting for wealthy individuals.

FindWealth Suite of Products

Pinpoint is an add-on to WealthEngine's suite of FindWealth products:

FindWealth Screening Services—provides comprehensive review and segmentation of your client and prospect records. Small or large batch screening delivers comprehensive, actionable wealth and affinity information for your prospect or donor records. FindWealth Screening uses our unique process, Loop Analysis, to uncover hard asset data on a donor or prospect and then applies statistical techniques to calculate and identify your most promising prospects.

FindWealth Online—an individual look up web-based research tool to help you qualify donors and prospects using wealth and affinity indicators. Save and manage results in a flexible history section that lets you group, print and modify records.