

Analytics. Research. Prospecting. Consulting.

Helping You Reach the Right People for the Right Purpose

Whether you're looking to **understand your current donors, identify prospective donors, or target and cultivate relationships** with constituents, WealthEngine can help you succeed.





With over 20 years of experience and some of the most effective tools for wealth intelligence, WealthEngine helps you identify individuals with the wealth and propensity to give to your organization and support your cause. WealthEngine solutions give clients a picture of the people they already know, and tools to find new people they would like to get to know.

WealthEngine has empowered **thousands of nonprofits** to raise **billions in funds** through major gifts, capital campaigns, planned giving, grateful patient programs, special events, annual fund and other fundraising and marketing efforts.

With WealthEngine, you can:

- » Develop or validate your fundraising strategy based on actionable wealth intelligence
- » Identify new donors with demonstrated affinity for organizations like yours
- » Establish targeted fundraising programs and campaigns
- » Leverage next-generation analytics and research to focus on the right prospects with the right ask

More than 3,500 clients turn to WealthEngine for comprehensive wealth identification solutions across four key areas: **Analytics, Research, Prospecting and Consulting.**

 ANALYTICS	Who are my best donors and prospects?	 RESEARCH	What can I learn about these people?	 PROSPECTING	How can I find more prospects just like them?	 CONSULTING	What strategies should I use to reach them?
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The foundation for WealthEngine's solutions is **FindWealth Online**, our wealth intelligence platform that brings comprehensive insight into the wealth and lifestyle of your donors and prospects. In 2012 WealthEngine will bring to market the next generation of this platform, FindWealth 8, making wealth intelligence easier, faster and more powerful than ever before.

FindWealth Online Features

- » Actionable intelligence with advanced analytics
- » Ability to search across 30+ databases
- » Volume and Express Wealth Appends
- » Accurate, easy-to-use and fast results
- » Relationship builders to show your prospect's Circle of Friends
- » Alerts to monitor when your donor or prospect makes the news
- » Detailed reports and comprehensive profiles
- » Integrate results into your DMS/ CRM

WealthEngine Ratings & Scores

- » Propensity to Give (P2G™)
- » Gift Capacity Rating
- » Gift Capacity Range
- » Estimated Giving Capacity
- » Inclination
- » Influence
- » Accredited Investor
- » Planned Giving – Bequest, Annuity and Trust

Analytics

Apply ratings and scores to systematically understand your donors and prospects and uncover new opportunities. WealthEngine offers flexible services for Volume and Express Wealth Appends for a comprehensive review of your records to quickly identify the top constituents with the greatest propensity and capacity to give.



- » Identify donors with the best ability & propensity to give
- » Segment and prioritize your database and/or prospect lists
- » Establish a data-driven cultivation strategy for each of your donor/prospect pools
- » Custom predictive models to predict giving and determine the right ask
- » Save time and get to the heart of your fundraising targets

Research

Comprehensive and user-friendly research to give you a complete picture and comprehensive wealth profile on your donors and prospects.



- » Online platform to research current and prospective donors
- » Generate, save and export individual wealth profiles
- » Append your database with data across 30+ sources
- » Leverage key ratings and client relationships to prioritize prospects

Research Across 30+ Information-rich Databases

- » Assets
- » Lifestyle
- » Family & Biography
- » Family Foundations
- » Real Estate
- » Business
- » Philanthropic Giving
- » Federal & State Election Contributions

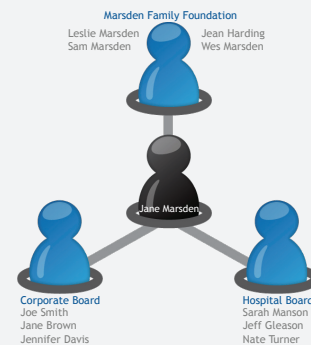
Prospecting

Expand your reach and build your prospect pipeline with targeted list services that get to the heart of your ideal prospect and tools to link relationships between your prospects and key individuals associated with your organization.



- » **Circle of Friends Networking** helps you discover relationships between your current donors and prospects and other potential prospects.
- » **Prospect Generator** allows you to search for new prospects based on geography, wealth, affinity or propensity, and instantly drill down to get a clearer picture of the individual's giving capacity, household profile, charitable contributions, and board affiliations.

Circle of Friends gives you access to an exponentially broader network, with visibility into the philanthropic and professional connections of your donors and prospects. **It's a continuous online referral pipeline without the awkward discovery conversation.**



Consulting

Optimize all facets of your prospect research, boost fundraising results and maximize return on investment with WealthEngine's customized consulting services.



- » Powerful insight and advice on your philanthropic-giving strategies
- » Experienced consultants with nonprofit and fundraising backgrounds
- » Dedicated attention guarantees you hit your goals, time and again

Consulting Services

- » Advanced Modeling
- » Standard and Custom Training
- » Fundraising Strategy and ROI Analysis
- » Platinum Account Service
- » Special Project Consulting
- » Integrated Marketing Services

