

WealthEngine provides a suite of analytic and modeling services designed to provide the knowledge and insight into your clients and their assets. Our services will help you optimize your data for maximum return on investment, effective strategy development and efficient wealth management.

Advanced Analytics

WealthEngine offers a wide variety of analytic and modeling services, including predictive modeling. Models provide companies with robust and actionable predictions of assets and client behaviors. WealthEngine’s modeling approaches include multiple regression analysis, decision trees, cluster analysis and other sophisticated statistical techniques. We determine the best analytic approach based on the specific needs of the client and the desired outcome of the data.

Robust Process for Predictive Model Development



Dependent and independent variables are selected for each client in a truly custom model building process. The dependent variable – the behavior you are trying to predict -- may be the overall best client, predictive spending levels, or need for future wealth management services. Independent variables – the predictor variables – may include data such as spending levels as a client, demographic information such as age and geography and the length of time as a client.

Modeling Benefits	Modeling Deliverables	Analytics Services
<ul style="list-style-type: none"> • Optimizes investment on best prospects • Combines client and WealthEngine data to enhance results • Delivers rank ordering of constituents based on desired behavior 	<ul style="list-style-type: none"> • Scoring of constituents based on statistical algorithm • Segmentation • Segment Profiling 	<ul style="list-style-type: none"> • Annual Fund Analysis • Feasibility Studies • New Prospect Identification Strategies

Wealth Engine Consulting Services

Our team of skilled and knowledgeable industry professionals can help make the most of your screening and/or analytic investment. We offer a wide range of services to assist you in meeting the challenges and opportunities of today’s wealth management climate.

In-Depth Profiling of Best Clients

We offer two levels of profiles depending on the needs of the client:

- Summary Profile
 - Validated contact information
 - Reports from each WealthEngine data source
 - Scores and Ratings
- Detailed Profile
 - Summary Profile+
 - Detailed demographics
 - Integrated analysis (from various data sources)
 - Narrative of profile

For more information on our Analytics and Modeling Services, please contact info@wealthengine.com or at 800.933.4446.