

Screen, profile & track groups of donors for every fundraising campaign

Whether you have a small donor database or millions of donor and prospect records, WealthEngine can screen and segment your data so you can focus on efficiency and affective communication to the right donors and prospects. For 19 years, WealthEngine has been helping nonprofit organizations of all spectrums increase their fundraising goals. More than 2,000 clients ranging in size and representing healthcare, higher education, advocacy, and other industries use WealthEngine for their prospect research and screening needs.

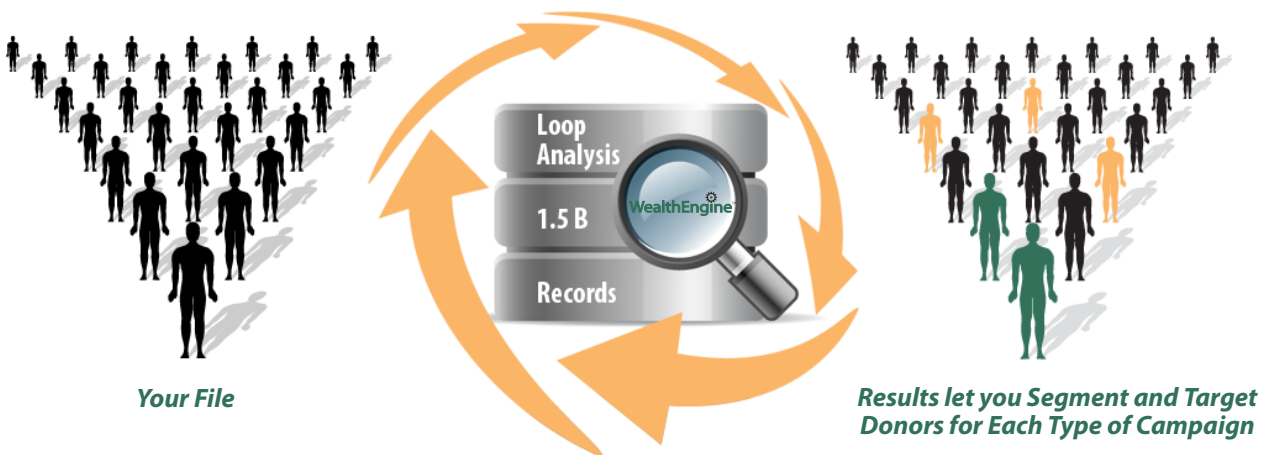
Key Features

- Largest and broadest range of data with 35+ data sources, including hard asset data.
- Comprehensive Loop Analysis ensures thorough screening.
- Proven Propensity to Give (P2G) statistical ratings segment your donor universe so you can be sure to make the right ask.
- Data enhancement options allow you to layer additional profile data including date of birth, phone number and email.
- Three levels of detail allow you to view your screening results at a summary level then move to a granular level for deeper analysis .
- Flexible delivery options to meet your timing and internal architecture: receive results via an Access Manager database, through your Donor Management System (DMS)/ Customer Relationship Management (CRM) platform or, for smaller files, via your FindWealth Online History Section.
- Easy integration of more than 50 data fields into your DMS via our **Prospect Link API**
- Direct link to FindWealth Online prospect research tool for detailed profiles on each donor

WealthEngine's Loop Analysis Process

WealthEngine uses a proprietary process Loop Analysis to run all of your records through all 35+ data sources to build wealth profiles on your donors and prospects. Each time new data (spouse, multiple properties, luxury boat ownership, etc.) is found, the entire record is rerun, "looping" through all data sources again so no piece of information is missed. You receive the most thorough screening available and the best results for action.

Unique Screening Process



Data Sources

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| Axiom Household Profiles | Federal Election Commission Contributors | Physicians Profiles |
| Cascaid - Philanthropist Profiles* | Guidestar Foundation Trustees | POW&R Wealthy Individuals |
| Charity Commission* | Guidestar Nonprofit Directors & Executives | Reuters Market Guide Profiles |
| Circle of Friends | Hemscott Public Company Directors* | Social Security Administration Master Death Index |
| D&B Business | Hoover's Business Information | State Political Donations |
| D&B Executives at Home | IRS Section 527 Directors & Organizations | UK Aircrafts* |
| DataQuick Assessment & Real Property Sales | JGA Charitable Donations | UK Political Donations* |
| Dialog News | LexisNexis Real Estate | U.S. Securities & Exchange Commission Filings |
| Do Not Mail | Marquis Who's Who Biographies | Waltman Charitable Gifts |
| Experian* | Merchant Vessels of the USA (Boat Ownership) | Waltman Directors |
| FAME* | Pension Data From Federal Form 5500 | WealthEngine Charitable Donations |
| Federal Aviation Administration Airmen & Aircrafts | Philanthropic Gifts | |

*UK Data Sources

Screening Solutions



	FindWealth Screening	WebExpress Screening
Frequency	By Occurrence	Ongoing, Frequent Schedule
Typical File Size	Small to large	Small, defined lists
Donor Types	<ul style="list-style-type: none"> Entire or partial donor database New donors or prospects 	<ul style="list-style-type: none"> New donors or prospects Patients Members/subscribers Parents or alumni Marketing lists
Delivery	<ul style="list-style-type: none"> Access Manager FWO History DMS/CRM integration 	<ul style="list-style-type: none"> FWO History DMS/CRM integration

Core Benefits

- **It's easy**—WealthEngine does the work for you, running your records against 35+ data sources via our Loop Analysis
- **It's fast**—Results from routine screens are delivered within two hours
- **It's flexible**—Results are delivered through your preferred format in three levels of detail
- **It's Smart**—Propensity to Give (P2G) ratings are provided for each donor in your screening database for clear segmentation

Client Support

WealthEngine has a reputation for providing superior and knowledgeable client service. You will receive hands-on service and training from the professional prospect research experts that form our client service team. Our seasoned account managers will work with you to ensure that your screening results are delivered to your specifications and that you get the training and ongoing support essential to success.

Included in every contract:

- Free training sessions via webcast
- Ongoing Thursday Workshops on prospect research topics
- Online Knowledgebase
- Best practice reports and webcasts
- Blog and social networking community to facilitate dialogue

Personalized service:

- **Custom training**—in-person or via webcast
- **Platinum Client Service Program**—work with a dedicated Client Service Account Manager to develop and execute on your fundraising programs on an ongoing basis.

Next Steps

Contact us today for a FindWealth Data Services demo or to arrange a free trial using your own test file. With nearly 20 years of experience and over 2,000 clients, we can deliver a screening solution that supports your goals:

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