

WE Enhanced Screen



Supercharge your screening with enhanced ratings and scores to give you transformational insight on your donors and prospects, so you can build high-powered fundraising and outreach strategies.

Apply Predictive Ratings & Scores to Drive Wealth Identification

WealthEngine's ratings and scores are the result of 20+ years of experience in wealth intelligence. We give you transformational insight into your donors and prospects so you can take action and increase donations.

Screening your database is useful to identify your best donor. All screenings contain valuable wealth information, such as an individual's net worth, income, assets, real estate, stock holding, charitable contributions and other financial related data.

The Enhanced Screen includes additional statistical ratings and scores that raise the level of information and can help further prioritize and segment your base. Understand how likely the donor or prospect is to give a major gift, their likelihood to give, their ability to donate planned gifts, and the amount you should ask for during your next conversation.

Wealth Scores and Ratings

Standard Wealth Screening Scores and Ratings

- » Propensity to Give
- » Total Assets
- » Net Worth
- » Cash on Hand
- » Estimated Annual Donations
- » Gift Capacity Range
- » Gift Capacity Rating
- » Influence
- » Inclination: Giving
- » Inclination: Affiliation
- » And more...

Enhanced Wealth Screening Scores and Ratings

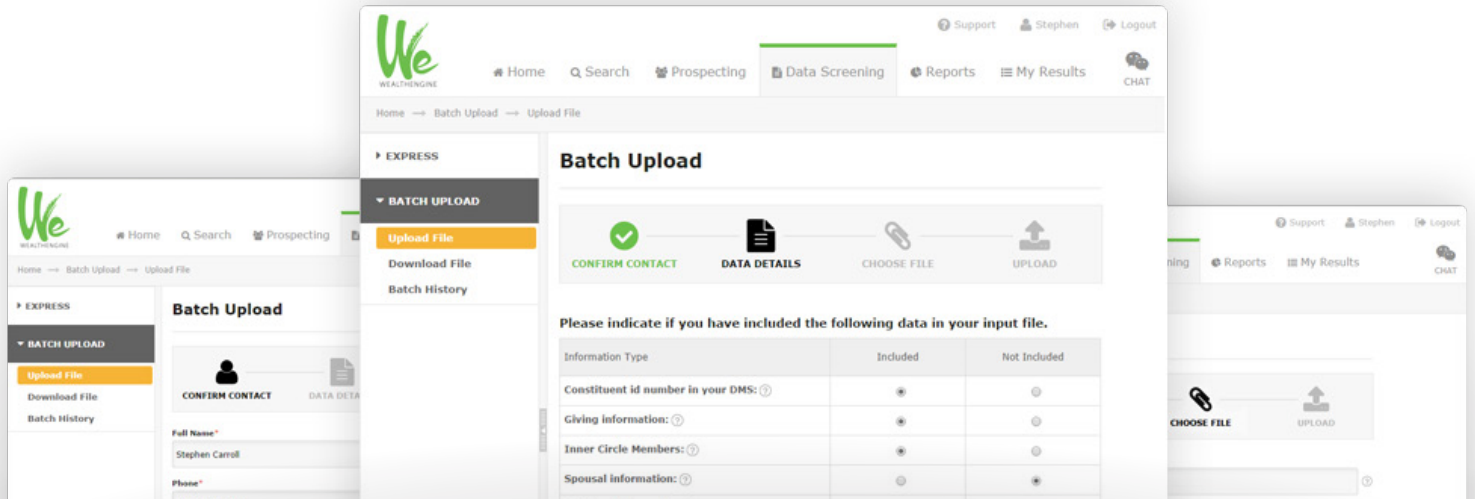
- » Major Gift
- » Likelihood to Give
- » Planned Giving
- » Next Ask Amount Tier

Prioritize and segment your donor base

Drive better donor engagement

Personalize fundraising campaigns

Maximize your donations



Propensity to Give

A score to assess an individual's means to give and the inclination to do so. It is based on exact household matches, overall wealth and financial ability.



Cash on Hand

Estimates the amount of available cash for the household. This is based on readily accessible, discretionary funds (e.g. checking, savings, money market accounts, etc.)



Total Assets

The total value of all financial and non-financial assets held by a household.



Estimated Annual Donations

The amount a prospect is likely to give to all nonprofits in a single year



Net Worth

The difference between total assets and total debt for a household.



Gift Capacity Range

The amount a prospect can afford to give to all nonprofits over five years

ENHANCED SCORES AND RATINGS



Major Gift

A rating that identifies the individuals likely to donate a major gift to an organization.



Planned Giving

A rating that identifies the individuals that would be likely candidates for planned giving.



Likelihood to Give

A rating that predicts how likely an individual is to give to an organization



Next Ask Amount

Predicts the next gift amount tier for each individual.



WEALTHENGINE
4330 EAST WEST HIGHWAY, STE 950
BETHESDA, MD 20814



800.933.4446
855.879.6082
INFO@WEALTHENGINE.COM
WEALTHENGINE.COM