

WE Integrate



Bring the power of wealth intelligence research and screening directly into your DMS/CRM system.

Insights, Delivered Directly into Your DMS/CRM

WE Integration establishes a powerful link between our FindWealth™ 8 wealth intelligence platform and your DMS/CRM, providing you valuable and easy access to comprehensive wealth insight.

Access the World's Most Powerful Wealth Intelligence

Integrating your DMS/CRM with WE's world-class FindWealth™ 8 wealth intelligence platform, gives you direct access to more than 50 WE data elements and proprietary wealth scores and ratings.

With WE integration you will have what you need to take your prospect research and screening efforts to the next level.

- » Save time and resources
- » Identify individuals worth pursuing
- » Prioritize prospecting efforts
- » Update constituent and customer data in real-time

Putting Powerful Capabilities to Action

With WE Integration knowing more about your audience is simple and easy:

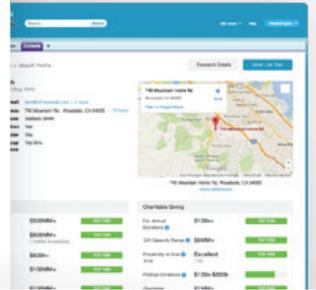
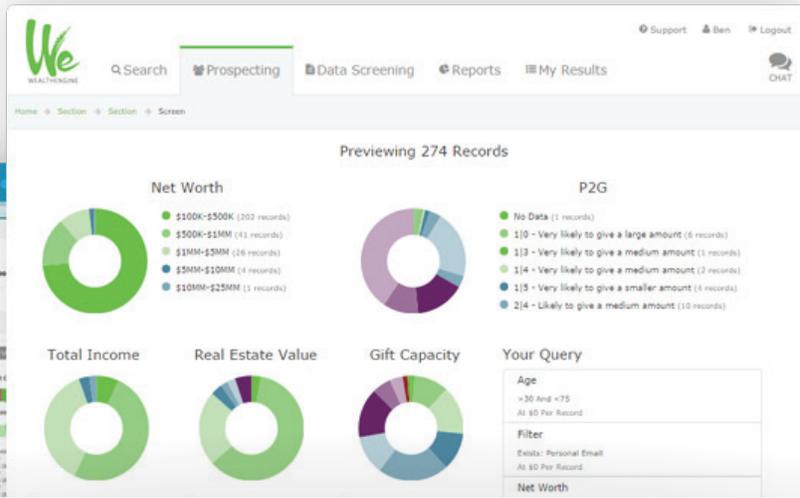
- » Import essential wealth profile ratings and scores with a single click directly within your DMS/CRM system to existing contacts via our two WealthConnect web service API's.
 - » ProspectLink API
 - » WebConnect API
- » Link detailed ratings and scores from WE to contacts, person accounts, or leads, using advanced prospect research functionality.
- » Use pre-formatted integration file for bulk import of offline screened data to bring wealth profile ratings and scores into your DMS/CRM system.

Pull essential wealth data directly into existing records in real time

Access complete wealth profiles on all your prospects and clients

Create reports and effectively segment your target audience

Easy-to-use interface with sophisticated custom features



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Import essential ratings and scores directly into your DMS/CRM with the click of a button!

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Built on a Foundation of Wealth Insight

WE helps you find, understand, and contact wealthy customers.

WE uses unique data to remove the guesswork from sales, marketing and fundraising so that you engage with people most likely to buy, invest or donate and don't waste time on the ones that won't.

WE are data scientists so that you don't have to be. We provide actionable insights and easy-to-use solutions that are integrated into the way you work.

Trusted Partner

WE combines 20+ years of wealth knowledge, the best data science in the world and a very large amount of data, you get insights and opportunities that no one else finds.

Get Started Today

Contact us at 800.933.4446 or visit at wealthengine.com.



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