



WealthEngine

WITH WEALTH ID • .com

Whether you need your
donor database screened or a
quick profile on a prospect,
WealthEngine delivers.

With the best and most comprehensive wealth, business and philanthropic data available, we listen to you to customize a research solution that fits your needs and resources. Best of all, you only purchase what you need and WealthEngine can pay for itself with the first major gift prospect found.

- ⚙ *Donor screenings show you which donors and prospects you should target*
- ⚙ *Web-based research center gives you the latest information on a donor, prospect, company or foundation*
- ⚙ *More than 25 top sources of public data—real estate, philanthropy, stock ownership and hard assets*
- ⚙ *Cutting edge technology in an easy-to-use platform*
- ⚙ *Robust organization and foundation searches*
- ⚙ *Handy reporting and history logs*
- ⚙ *Quick links to your VIPs and adjustable giving capacity rating and scoring*
- ⚙ *Customized solutions and pricing for every budget*
- ⚙ *Donor management system (DMS) integration*
- ⚙ *Experienced staff—the best and brightest in the market*



PRODUCTS & SERVICES

As the largest and fastest growing company in the industry, WealthEngine offers research products for companies of all sizes:

FindWealth Online—a web-based marketing tool with immediate results on individuals, companies and foundations. With each search more than 25 top databases are scanned for the latest information and then compiled into an easy to read, easy to print profile. You access valuable hard asset information like real estate, pension and income, as well as biographical and philanthropic data. Review securities information through Wealth ID's Pinpoint and stay informed on clients through Dialog NewsRoom, an email-based news alert service. You can also save results in your own online history archive and create folders for special groups like prospects and donors. There is no wait; results are posted within seconds.



FindWealth Online Profile

FindWealth Screening Services—for small to large numbers of donor or prospect records. WealthEngine's unique process, called Loop Analysis, runs your records through our data sources over and over again as each new piece of information is found so no detail is missed. Once Loop Analysis is completed, we apply statistical models to calculate ratings and scoring. The result is clear, comprehensive information that you can take from desktop to donor meeting.

Each screening is customized by the volume and extent of detail that you need:

Step 1: Basic—reviews all records to assign ratings for giving capacity, influence, inclination, propensity to give, and planned giving. The results are often used to:

- Develop planned giving or direct marketing mailings. For example, after reviewing one-hundred thousand records you can use the Basic Profile to determine your top ten-thousand planned giving prospects
- Develop an overall strategy for donor segments

Step 2: Insight—provides more detail on giving capacity components and propensity to give scores. These profiles:

- Help you segment your file into annual fund upgrades and your most promising prospects
- Identify individuals with strong links to your organization and/or philanthropic inclination
- Search key words

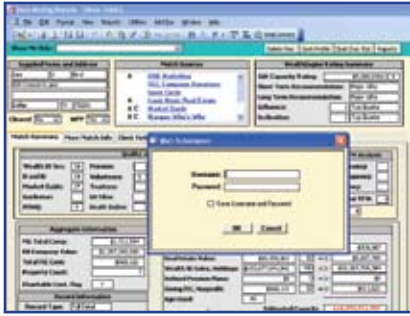
Step 3: Beyond—comprehensive profiles for developing cultivation strategies. You use it to project ask amounts for your major gift prospects. The detailed profiles are essential to several major gift activities:

- Find links to similar charitable efforts
- Identify in-the-money stock options due to expire in 90 days
- Develop well-planned ask strategies



FindWealth Beyond Data





WebConnect links your FindWealth Screening to FindWealth Online

WebConnect—link your FindWealth Screening results (provided in an Access Manager database) to your FindWealth Online Advanced Search Page. Your research is always seamless, fast and complete.

WebConnect for DMS—connect your donor management system (DMS) database to FindWealth Online for quick, current research.

ProspectLink—application programming interface (API) that allows for a bidirectional flow of hard asset data to be updated directly in the DMS database. You can refresh existing information or import & save new data. This integrated solution will help drive workflow within your DMS.

WebExpress—offers ongoing screening services for organizations with a regular influx of new prospects. Use WebExpress on a daily, weekly, monthly or quarterly basis.

FindWealth Online UK & FindWealth Screening UK—products specifically designed for research in the United Kingdom. With data sources exclusive to the UK, these tools are useful for international clients.

Research Training & Support—tenured researchers provide training to you and your colleagues on how to increase the value of your prospect research efforts.



TOP DATA SOURCES



Decide with Confidence



Coming Soon! Airplane Ownership
AMA Physician Profiles

Axiom Household Profiles
Cascaid

Charity Commission
D&B Business

D&B Executives at Home

DataQuick Assessment & Real Property Sales
Dialog News Alerts

Experian

Federal Election Commission Contributors
GuideStar Foundation Trustees

GuideStar Nonprofit Directors & Executives
Hemscott

IRS Section 527 Directors & Organizations
JGA Charitable Donations

LexisNexis Real Estate

Marquis Who's Who Biographies

Pension Data from Federal Form 5500
Philanthropic Gifts

POW&R Wealthy Individuals

Reuters Market Guide Profiles

Securities & Exchange Commission Filings

Social Security Administration Master Death Index

Coming Soon! State Business Registrations

State Political Donations

Merchant Vessels of the USA (Boat Ownership)

UK Airmen & Aircrafts

Waltman Charitable Gifts

Waltman Directors

WealthEngine Charitable Donations

WealthID Stock Information

Zoominfo



PROCESS

- 1) Contact WealthEngine at (301) 215-5980 or info@wealthengine.com for more information about our screening and online research tools. You will work with a sales representative who can help you determine which products are right for you.
- 2) Try a free, two day trial of FindWealth Online. Training prior to the trial lasts approx. 30 minutes and is conducted via telephone while at your computer. Subscriptions are generally offered on an annual basis with payment by credit card or invoice.
- 3) Send in a test file for a FindWealth screening. Review your results with your sales representative according to your timeframe.
- 4) Contract for FindWealth screening services and schedule training for you and your staff. Training may be conducted in person or via webinar.
- 5) Integrate findings in your donor management system.
- 6) Use WealthEngine experts for conferences and staff trainings.



THE WEALTHENGINE DIFFERENCE

Unique, reliable information

Key data, services and reports unavailable through other vendors

Customized results

Buy only what you need and nothing more

Immediate response

Advanced technology that doesn't make you wait

Great training & customer support

We listen to you and focus on your needs...always



COMPANY BACKGROUND

WealthEngine.com's roots date back to 1991, when its predecessor company—Prospects of Wealth & Resources (POW&R)—began to serve non-profit and financial organizations with a revolutionary wealth identification tool. In early 2000, the entire company was overhauled and our products were redesigned to take advantage of new and promising research technologies.

Soon our internet-based research service, FindWealth Online, was launched to provide the financial services and nonprofit sectors with immediate access to some of the most well-known publicly available databases. By late 2000, POW&R completed its transformation and began doing business as WealthEngine.com.

In 2005, WealthEngine extended its programs to the United Kingdom to create the first international research vehicle through its FindWealth Online UK and associated screening service products. WealthEngine also merged with a leading research company, Wealth ID (formerly a division of Thomson Financial), to become the largest provider of database/technology solutions to the financial industry. Today, WealthEngine offers the broadest range and highest quality of data sources, the strongest technology and the most experienced staff in the industry.

Why not give us a try today?



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