

## DonorPerfect

**WealthEngine**  
WITH WEALTH ID .com

### Advanced Prospect Research Data Services

Identifying potential major donors and targeting annual or capital campaigns is a snap, thanks to DonorPerfect's integration partnership with WealthEngine. With this service, you can screen your donor database using WealthEngine's sophisticated prospect research system. The rating data on matching donors is easily imported into DonorPerfect, where it can be used for targeting campaigns and solicitations.

### Features

- Screened or on-demand data on donor, prospect, company, or foundation wealth
- More than 25 top sources of public data—including real estate, philanthropy, stock ownership and hard assets
- Unique rating system to assist with targeting and segmenting for major gifts, planned giving, and annual fund campaigns
- Web-based research center gives you the latest information on a donor, prospect, company or foundation
- Quick links to your VIPs and adjustable giving capacity rating and scoring
- Integration with DonorPerfect brings data directly into the appropriate fields
- Up to 12 hours of webinar training on how the services work and how to use the information for maximum financial benefit

### Available Services

#### FindWealth Online

A web-based research tool with immediate results on individuals, nonprofits, foundations and companies. With each look-up, all the source databases are scanned for the latest information and then compiled. You access the most current data on valuable hard asset information like real estate, pension and income, as well as philanthropic and biographical data.

#### FindWealth Screening Services

Screen all or just a segment of your DonorPerfect database against Wealth Engine's data services. This data analysis applies statistical models to calculate ratings and scoring for each matched record. Summary information can be easily imported back into your DonorPerfect database for further reporting and filtering. The result is clear, comprehensive information that you can take from desktop to donor meeting.

#### Additional WebService Options:

**WebConnect for DMS** - This provides a WealthEngine lookup button directly from within DonorPerfect. This one-click access to FindWealth Online provides up-to-the-minute detailed wealth information.

**Pinpoint** - This add-on service allows you to track and update key stock information for a company or its corporate executives.

**Dialog NewsRoom** - Monitor transactions and news with automatic email alerts via Dialog's push technology of more than 10,000 media sources.

*“We’ve completed the initial screening, and use FindWealth Online constantly. I think it is a **MUST** for people with any size databases who need to know their donors better and maximize their fundraising success.”*

**Jack Kalla, AISH**

## Pricing

FINDWEALTH ONLINE SERVICE		
Product	List Price	Notes
<b>FindWealth Online</b> (US or UK version)	3 concurrent users	\$2,500 / Year
	5 concurrent users	\$5,000 / Year
	7 concurrent users	\$7,500 / Year
	8+ concurrent users	Call for pricing
<b>WebConnect for DMS</b>	\$1,000 / Year with a screening \$1,500 / Year without screening	One-click access from DonorPerfect to detailed FindWealth Online research results. You must subscribe to FindWealth Online to use WebConnect for DMS.
<b>Pinpoint &amp; Dialog Add-on</b>	Call for pricing	

FINDWEALTH SCREENING SERVICES		
Product	List Price	Notes
<b>FindWealth Level One</b>	<b>\$0.15 / record*</b>  Top 11% delivered as Insight/Beyond profiles Remainder delivered as Basic profiles	Identifies matched source & includes all rankings and ratings. Delivers over 42 defined fields of data, which SofterWare will import directly into DonorPerfect as part of our value-added service - <b>a savings of over \$600!</b>
<b>FindWealth Level Two</b>	<b>\$0.20 / record*</b>  Top 15% delivered as Insight/Beyond profiles Remainder delivered as Basic profiles	<b>Basic</b> reviews all records to assign ratings for giving capacity, influence, inclination, direct marketing and planned giving.  <b>Insight/Beyond</b> provides comprehensive profiles for developing cultivation strategies. It gives more detail on giving capacity components and direct marketing scores. Use it to project “ask” amounts for Major Gift prospects.  *Screening cost minimum = \$1,000 and requires a FindWealth Online subscription.

To order or ask questions, please call 800-220-8111 to speak to your account representative.