Identify, profile and track your best donors for every fundraising campaign

Identifying and cultivating the right donors and prospects is the key to driving your organization forward. But finding your highest major gift donors with significant wealth, disposable income and an inclination to give to your organization can be a challenge.

With 20 years of experience and some of the most effective tools available to prospect researchers and fundraising professionals, WealthEngine helps you identify donors and prospects with the wealth and the propensity to give to your organization. We've empowered thousands of nonprofit organizations to raise billions in funds through major gifts, capital campaigns, planned giving, grateful patient programs, event marketing and annual fund efforts.

Key Features

- Wealth screening options allow you to search on-demand or via batches of records for every fundraising campaign you employ.
- Largest and broadest range of data with 35+ sources, including real estate ownership, other hard asset data, philanthropic gifts, biographic profiles, social interests and more.
- Comprehensive Loop Analysis ensures thorough screening.
- Proven statistical ratings (Propensity to Give (P2G™), Gift Capacity, etc.) to segment your donor universe so you can make solicitation requests with confidence.
- Flexible delivery options to meet your timing and internal architecture requirements; receive results via online account or separate Access database.
- Ability to integrate prospect research and screening results into your DMS and CRM database.

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 clients 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

WealthEngine • 4330 East West Highway • Bethesda, MD 20814
800.933.4446 • Fax: 301.215.5987 • www.wealthengine.com

Prospect Research & Screening Solutions

FindWealth Online℠

Research individuals, public companies, nonprofit organizations and foundations

- Search and review individual profiles, save results in your history
- Research across 35+ data sources including hard asset data
- Perform unlimited and immediate searches 24 hours a day
- Track changes to donor/prospect profiles

FindWealth Screening

Screen, profile and track groups of donors against user-defined criteria

- Screen across 35+ data sources
- Loop Analysis screens data against user-defined criteria
- Apply proven P2G ratings to identify best donors for major gifts, annual fund, etc.
- Export results into Excel and integrate into your Donor Management System (DMS)

WebExpress℠

Systematically review your newest prospects when you need them

- Routine on-the-spot screening across 35+ data sources
- Results are immediate and can be automated
- Frequency-based service can be used daily, weekly, monthly, quarterly, or on-demand
- Create timely donor/prospect profiles

Prospect Generator℠

Methodically build reliable, customized prospect lists based on geographic and financial data

- Access financial data on 35M + individuals and 13M + high net worth individuals
- Identify donors by affinity based on donations and board affiliations
- User-defined search criteria
- Save lists and easily export them into Excel

Analytics and Modeling

Prioritize your constituents based on robust predictions of desired giving behaviors

- Optimize all available data using rigorous statistical techniques
- Rank order constituents based on behaviors such as likelihood to give or expected gift amount
- Focus resources on your top prospects

Pinpoint℠

Track and search detailed financial positions of company insiders and SEC data

- Includes key securities and hard asset information on company insiders
- Daily updates from SEC filings and direct links to SEC Forms
- Search by company ticker or by location to identify new prospects
- Set alerts for trade and sale transactions on specific prospects

Integrate Wealth Profiles with Your Donor Management System

WealthEngine has developed integration partnerships with just about every DMS/CRM provider in order to make the management of donor and prospect data seamless for our clients. With a WealthConnect integration, clients are able to access WealthEngine's data directly from a link in their DMS/CRM, making it easier to prepare for a meeting or plan a solicitation. Clients can also easily identify their top prospects based on clearly-defined capacity ranges and propensity to give (P2G) ratings.

Client Support

WealthEngine has a reputation for providing knowledgeable client service. Our account managers will work with you to ensure that you get the training and ongoing support essential to success. We provide complimentary, weekly web-training sessions, monthly Thursday Workshops on prospect research topics, an online Knowledgebase with Best Practice reports and webcasts, and a Blog and social networking community to facilitate dialogue. As an optional service, WealthEngine's Platinum Client Service offers a dedicated Client Service Account Manager to work with you to develop and execute on your fundraising programs on a regular basis.

Next Steps

Learn how we can help you. Contact us today at info@wealthengine.com to schedule a WealthEngine demo or to arrange a free trial. With 20 years of experience and over 2,000 clients, we can deliver a research solution that supports your goals.

WealthEngine™

FindWealth Online℠

Raise more funds from existing donors and build a pipeline of qualified prospects with on-demand prospect research tools

Timing is everything when cultivating a donor or researching a new prospect. Using key wealth, biographical and philanthropic information can give you an edge when cultivating donors and estimating ask amounts. That's where prospect research comes in—for over 20 years, WealthEngine™ has been helping nonprofits of all sizes increase their overall fundraising effectiveness. In fact, over 2,500 organizations look to WealthEngine for their prospect research and screening needs.

Whether you are updating your prospect pipeline, responding to a leadership request for a quick donor profile, or identifying major gift prospects among special event registrants, FindWealth Online℠ gives you reliable information in mere seconds. With an extensive range of data available, you can validate and act on fundraising initiatives with the speed and confidence to deliver real results.

Key Features

- **Simple & Advanced search logic** compares all data sources
- **Relationship builders** show your prospect's Circle of Friends
- **Propensity to Give (P2G™)** segment as your donors
- **Charitable Donations** database
- **Foundation Search** contains a direct link to form 990s
- **Dialog NewsRoom™** with the ability to setup email alerts
- **Easy to use, print and export** to PDF or Word format
- **Integrate results** into 50 DMS and CRM databases
- **Federal and State Elections** donation records

Valuable Data

By combining our extensive collection of data sources, WealthEngine gives you speed and simplicity in its flagship product. There is no need to sort through multiple data providers; FindWealth Online quickly generates reports detailing real estate ownership, other hard assets, philanthropic gifts, biographic profiles and social interests.

Key wealth identifiers include:

- **Giving Capacity -** giving capacity estimates for every individual in the database over a five year period
- **Assets -** income, real estate holdings, insider stock and options holdings, pension
- **Lifestyle -** do they own a plane or boat & details on each craft
- **Family & Biography -** age, family, home address, and vacation homes
- **Real Estate -** including mortgage (1st and 2nd), lender, taxes, sale dates and market, assessed values, home loan value and length of residence
- **Business -** where they work, sales, business history, business ventures
- **Philanthropic Giving -** who are they giving to, how much and when
- **Federal & State Election Contributions -** political affiliations, who are they giving to, how much and when
- **Family Foundations -** details on every family foundation in the U.S.

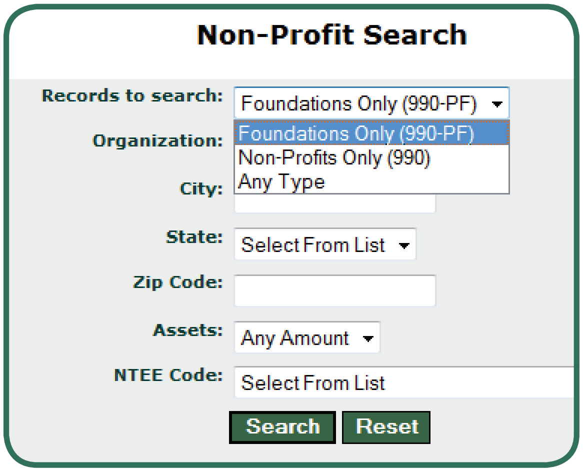
Data Sources

- Acxiom Household Profiles
- Aircraft
- Airmen's Certificate
- Charitable Donations
- DataQuick Real Estate
- Dun & Bradstreet
- Dun & Bradstreet State Business Registrations
- Federal Election Commission Campaign
- Foundation Trustees
- GuideStar Directors
- GuideStar Foundations
- Hoovers Business Information
- IRS Pension Holders
- LexisNexis Real Estate
- Marquis Who's Who
- Merchant Vessels
- National Do Not Mail Registry
- National Physicians Profiles
- Philanthropic Donations
- Prospects of Wealth & Resources (POW&R)
- Reuters Market Guide Profiles
- Section 527 Directors
- Section 527 Political Contributions
- Social Security Master Death Index
- State Boat Registrations
- State Political Donations
- WealthID Securities

WealthEngine • 4330 East West Highway • Bethesda, MD 20814
800.933.4446 • Fax: 301.215.5987 • www.wealthengine.com

Expand your research:

- **Foundation Search -** access 100,000 foundations, corporate gifts and grantmaking public charities. Includes geographical area, contact information, organizational NTEE codes and links to their Form 990.
- **Dialog NewsRoom™ -** set up an email alert system to notify you when key donors and prospects are making news or research directly in the NewsRoom's portal of 11,000+ top news sources:
  - Trade, business and scholastic journals
  - Local newspapers
  - Regional business publications
  - National and international business newspapers
  - Industry newsletters
  - Broadcast transcripts
  - Corporate news releases



Robust Add-ons for Every Need

Strengthen the power of FindWealth Online with features that enhance your research, broaden prospecting capabilities and streamline workflows:

- **Pinpoint℠ -** track key securities transactions (updated daily) and changes in financial position that create wealth opportunities in an online portfolio.
- **Prospect Generator℠ -** create segmented lists of affluent prospects (by affiliation, geography, assets or analytics) with the greatest wealth, disposable income and inclination to give to your organization.
- **ProspectLink℠ and WebConnect℠ -** seamlessly integrate up to 60 data fields into your DMS to keep your screening data fresh and directly linked to gift data.
- **WebExpress℠ -** screen small batches of records (special event attendees, grateful patients, freshman parents, etc.) with delivery into your FindWealth Online℠ History Section.

Client Support

WealthEngine has a reputation for providing knowledgeable client service. Our account managers will work with you to ensure that you get the training and ongoing support essential to success.

Included in every contract:

- **Free training** sessions offered weekly via webcast
- Ongoing free **webinars** on prospect research topics
- Online **Knowledgebase**
- **Best practice reports** and webcasts
- Blog and **social networking** community to facilitate dialogue

Contact us today at 800.933.4446 or info@wealthengine.com for more information. Simply put, prospect research is what we do. With over 20 years of experience and over 2,500 clients, we can deliver an immediate, results-oriented prospect research solution that supports your fundraising goals.

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

Your File

Results let you Segment and Target Donors for Each Type of Campaign

Data Sources

Acxiom 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

WealthEngine • 4330 East West Highway • Bethesda, MD 20814
800.933.4446 • Fax: 301.215.5987 • www.wealthengine.com

Screening Solutions

	FindWealth Screening	WebExpress Screening
Frequency	By Occurrence	Ongoing, Frequent Schedule
Typical File Size	Small to large	Small, defined lists
Donor Types	• Entire or partial donor database • New donors or prospects	• New donors or prospects • Patients • Members/subscribers • Parents or alumni • Marketing lists
Delivery	• Access Manager • FWO History • DMS/CRM integration	• 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 knowledgable 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:

Toll-free: 800-933-4446 · Email: marketing@wealthengine.com · Website: www.wealthengine.com

WealthEngine • 4330 East West Highway • Bethesda, MD 20814
800.933.4446 • Fax: 301.215.5987 • www.wealthengine.com