



WealthEngine

WITH WEALTH ID • .com

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

With 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 purchase what you need and WealthEngine can pay for itself with the first major gift prospect found.

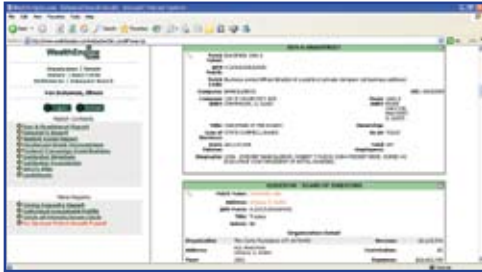
- ⚙ *Donor screenings show you which donors and prospects you should target*
- ⚙ *Web-based research center gives you the latest information on a donor, prospect, company or foundation*
- ⚙ *More than 20 top sources of public data—real estate, philanthropy, stock ownership and hard assets*
- ⚙ *Cutting 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 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 organizations of all sizes:

WebService Research Center—a web-based research tool with immediate results on individuals, non-profits, foundations and companies. With each look-up more than 20 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 philanthropic and biographical data. Our latest additions include Wealth ID's Pinpoint proprietary stock information and a handy news alert service. Best of all, save results in your own history section and create folders for special groups like board members, special event



WebService Profile

attendees and prospects. There is no wait; results are posted within seconds.

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, direct marketing and planned giving. The results are often used to:

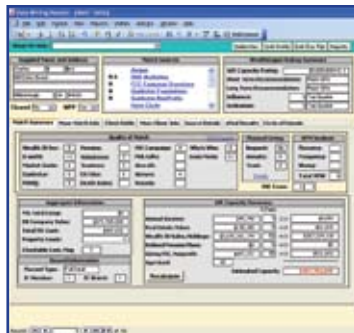
- Develop planned giving or direct marketing mailings. For example, after reviewing one-hundred thousand records you can use the Basic Profile to determine your top ten-thousand Planned Giving prospects
- Develop an overall strategy for donor segments

Step 2: Insight—provides more detail on giving capacity components and direct marketing scores. These profiles:

- Help you segment your file into Annual Fund upgrades and Most Promising Prospects (MPPs)
- Identify individuals with strong links to your organization and/or philanthropic inclination
- Search key words

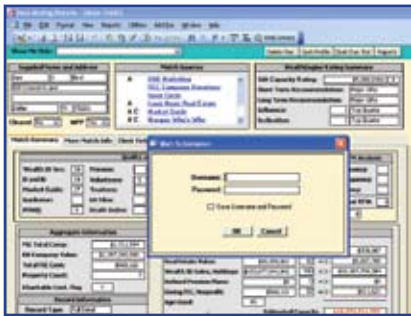
Step 3: Beyond—comprehensive profiles for developing cultivation strategies. You use it to project ask amounts for your Major Gift prospects. The detailed profiles are essential to several major gift activities:

- 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

WebConnect—link your FindWealth Screening to our WebService Research Center for quick updates. FindWealth can also be integrated into most donor management systems so your research is seamless, fast and complete.

WebExpress—ongoing screening services for nonprofits with a regular influx of new prospects, especially health care organizations, public radio, museums, theatres, symphonies and higher education institutions. Use FindWealth Screening on a daily, weekly or monthly basis.

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

Prospect Research Training & Support—tenured prospect researchers provide training to you and your colleagues on how to increase the value of your data mining and research efforts. These training sessions are tailored to your needs and may be conducted in-person or via online webinar.



WebService UK



TOP DATA SOURCES



Decide with Confidence



The real estate information experts™

- Airplane Ownership
- Axiom Household Profiles
- D&B Business
- D&B Executives at Home
- DataQuick Assessment & Real Property Sales
- Dialog News Alerts
- Experian
- Factory
- Federal Election Commission Contributors
- GuideStar Foundation Trustees
- GuideStar Nonprofit Directors & Executives
- Hemscott
- HEP Development Matching Gifts
- 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
- Social Security Administration Master Death Index
- Thomson Financial SEC Stock Information
- US Coast Guard Merchant Vessels
- Waltman Charitable Gifts
- Waltman Directors
- WealthEngine.com Charitable Gifts
- WealthID Stock Information



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 WebService Research Center trial. 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 within three weeks.
- 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, called WebService, was launched to provide development staff 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 WebService UK and associated screening service products. WealthEngine also merged with a leading prospect research company, Wealth ID, to become the largest donor screening company in the world. Today WealthEngine offers the broadest range and highest quality of data sources, the strongest technology and the most experienced staff in the industry.

With an annual sales growth of 30% and high customer retention rate, WealthEngine is a company dedicated to client satisfaction and steady, long-term market leadership.

Why not give us a try today?



WealthEngine
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