WealthEngine™ Advanced Prospect Wealth Screening & Research Data Services

Identifying potential major donors and targeting annual or capital campaigns are 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.

WealthEngine provides valuable data from over 30 data sources including:

- Real Estate Holdings & Hard Assets
- Charitable Donations
- Stock Ownership & Securities
- Election Contributions
- Business Ratings
- Biographical Information and More!

Integration with DonorPerfect allows WealthEngine collected data to be imported directly into the appropriate fields.

“We ran a list of individuals we didn't know much about through WealthEngine and, as a result, just received a $75,000 gift! It's a MUST for people with any size databases who need to know their donors better and maximize their fundraising.”

- Rabbi Jack Kalla, AISH

More information: Call us at 800-220-8111. Or visit: www.donorperfect.com/moreinfo
## 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. This service delivers over 42 defined fields of data, which SofterWare will import directly into DonorPerfect as part of our value-added service - a savings of over $600!

### Additional WebService Options:

**WebConnect for DMS** - This provides a WealthEngine lookup button directly from within DonorPerfect. This one-click access to FindWealth Online (subscription required) provides up-to-the-minute detailed wealth information and includes all rankings and ratings. DPO clients can automatically upload the data with one-click!

**WebExpress OnDemand** - Make screening part of your everyday fundraising process. Screen small batches of your database when you need to and import the results!

**Prospect Generator** - Cutting edge, proprietary database of 7M individuals worth $1M+. You set the criteria based on geographic area, net worth, properties owned, stock and options, etc. and download the results for instant prospecting, upselling and direct marketing opportunities.

## Features

- Screened or on-demand data on donor, prospect, company, or foundation wealth
- Over 30 top sources of public data, such as 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 provides the latest data on a donor, prospect, company or foundation
- Quick links to your VIP’s 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 the services, including how to best use the information

## WealthEngine Success Stories!

- A Boston hospital screens patient lists for potential donors, sending appeal letters to promising prospects. One such mailing resulted in a $100,000 gift.

- A Midwest college screened 12,000 names, using the results to guide their direct mail campaign. They adjusted the ask amount for the most promising prospects, and modified the ask for mid-level donors based on newly discovered data on giving to other organizations. Results: average gift amounts increase from $64.00 to $112.00.

- A New York library secured a $500,000 gift after screening its members and learning that a man who brought his kids to the library each Saturday morning was on the Forbes list of top hedge fund managers, making over $100 million annually.

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