

WE Screen: Wealth Scores & Ratings



Ratings and scores give you transformational insight on your customers and prospects, so you can build effective marketing and business development strategies.

Apply Ratings & Scores for Effective Wealth Identification

The cornerstone of our profiles is our proprietary wealth ratings and scores. Our ratings and scores, developed leveraging 20+ years of experience in wealth intelligence, provides deeper insight into a prospect.

WealthEngine's ratings and scores give you transformational insight on your customers and prospects, so you can build effective marketing and business development strategies. This insight is useful to not only identify your best customers, but to uncover those individuals who may show potential for additional business.

Our profiles contain information on an individual's net worth, income, assets, real estate, stock holding, charitable contributions and other financial related data as well as business and personal contact information.

Wealth Scores and Ratings

Wealth Insight Scores

- » Propensity to Give
- » Propensity to Spend
- » Estimated Spending Capacity
- » Total Assets
- » Net Worth
- » Cash on Hand
- » Estimated Annual Donations
- » Gift Capacity Range

Wealth Attribute Ratings

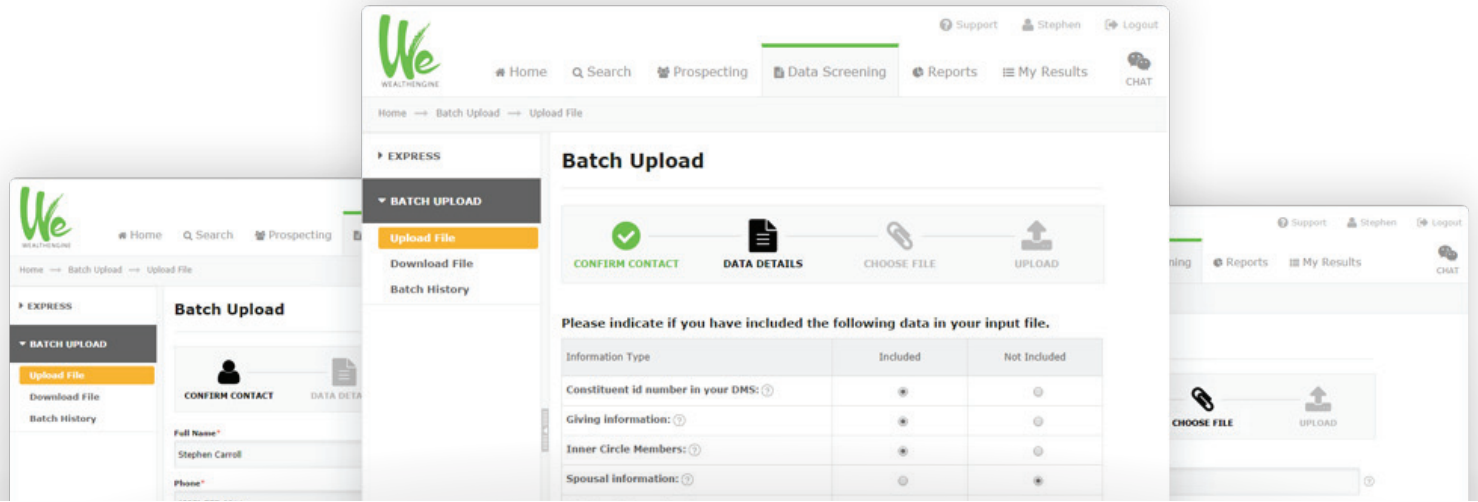
- » Gift Capacity Rating
- » RFM
- » Planned Giving—Bequest, Annuity & Trust
- » Influence
- » Inclination: Giving
- » Inclination: Affiliation

Identify current customers for cross sell and upsell opportunities

Identify prospects with connections to your current ones

Execute targeted marketing campaigns and sales promotions

Maximize marketing ROI



Propensity to Give

A score to assess an individual's means to give and the inclination to do so. It is based on exact household matches, overall wealth and financial ability.



Cash on Hand

Estimates the amount of available cash for the household. This is based on readily accessible, discretionary funds (e.g. checking, savings, money market accounts, etc.)



Total Assets

The total value of all financial and non-financial assets held by a household.



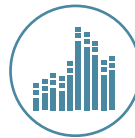
Estimated Annual Donations

The amount a prospect is likely to give to all nonprofits in a single year



Net Worth

The difference between total assets and total debt for a household.



Gift Capacity Range

The amount a prospect can afford to give to all nonprofits over five years



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