Simple Search

- Easiest way to search with only a name and state
- Best utilized as a tool to find addresses in order to build an Advanced Search
- Best four data sources for addresses:
  - Lexis-Nexis (default)
  - Federal Election Contributions
  - Dun & Bradstreet
  - Household Profile

Notes

Building Your Advanced Search

- At minimum, a full name and address are necessary to conduct an Advanced Search
- Clicking the **Advanced** link from a Simple Search will auto-populate your search
- Optional Fields make a difference; the more you put into your search, the better your results
  - Graduation Date – must be undergraduate graduation date (used for age calculation)
  - ID is the ID number assigned to this prospect in your database (used when importing results)
  - Giving information is specific to your organization, will impact ratings & scores

Notes

Advanced Search Results Screen

- Search Criteria box – allows for Facebook/LinkedIn search on prospect
- Match List box – shows data sources where matches were found, along with QOM
- QOM (Quality of Match) is a point system providing a confidence gauge for data
    - A QOM score of 9 or higher is considered an exact match
    - A QOM score of less than 9 indicates that more validation may be required
    - Click on a data source to view the QOM details found in the Match String

Notes

Match Summary Tab – Ratings and Scores

- P2G (Propensity to Give) score – quick way to segment results
    - P2G 1's are major gift prospects (1-0 are best of the best)
    - P2G 2's are potential upgrade & planned giving prospects
    - P2G 3's are annual fund prospects
    - P2G 4's are prospects for direct mail acquisition
    - P2G 5's do not match any WealthEngine data sources
- Giving Capacity Rating/Range – easy way to segment by Estimated Giving Capacity
- Influence – measure of a prospect's influence/connections in their community
- Inclination – measure of a prospect's willingness to give based on past donations
- Accredited Investor – A Yes or No flag identifying significantly wealthy individuals
- Planned Giving Ratings – identify prospects for three types of gifts: bequest, annuity or trust
    - Ratings are based on a combination of age and Estimated Giving Capacity

Notes

Match Summary Tab – Estimated Giving Capacity

- Aggregate Information – summary of key information found in data sources
  - Property count only includes currently owned properties with a QOM of 9 or higher
- Estimated Giving Capacity is a combination of five components:
  - Income – uses data from Market Guide, Hoover's, Lexis-Nexis or Household Profile
  - Stock – data found in Wealth ID Securities
  - Pension – only included if plan has five or less members
  - Real Estate – Total value of properties included in Property Count
  - Giving – Includes all political giving and any giving to your organization
- Estimated Giving Capacity - total amount prospect can give to any & all causes over a five year span

Notes

Additional Tools

- Supplemental Rating Information – add or subtract values to or from aggregate values
  - Click on the green plus to access
- Recalculation Options – add giving information or age criteria, adjust Giving Capacity formula
  - Click on the calculator and pencil to access
- Expanded Web Search – search for additional information using a variety of popular search engines
  - Within a data source record, click on the magnifying glass to access

Notes

Circle of Friends

- Each prospect searched has a Circle of Friends, a list of their personal network of colleagues
- The Inner Circle is your list of active supporters, which can include:
  - Board Members
  - Staff
  - Loyal Donors
  - Longtime Volunteers
- When viewing a prospect's Circle of Friends, your Inner Circle members will be highlighted
  - These highlights provide valuable insight as to how to approach a prospect for cultivation
- There are two ways to create your Inner Circle:
  - Search each individual you wish to add, then add these individuals from your History
  - Work with your Client Service Representative to upload a spreadsheet of names & addresses

Notes

For more information, feel free to sign up for our fee weekly training, presented in two parts:

- **Introduction to FindWealth Online** – Tuesdays at 2:00pm Eastern
- **Applications of FindWealth Online** – Wednesdays at 2:00pm Eastern

To register, contact your Client Service representative or view our full training schedule at:

www.wealthengine.com/nonprofit/our-services/product-training

History Section – Searching and Actions

- Every Advanced Search is automatically saved in your History section
- Search screen provides options for sorting and filtering your History records
- "I Want To" drop-down box provides options for managing your History records, including:
  - Delete – permanently delete records from your History
  - Inner Circle Creation – add individuals from History to your Inner Circle list
  - Combine Two Records – merge two records to create a single composite profile
  - Move to Folder – used to move records between folders and create new folders

Notes

History Section – Reports and Exports

- The Report Options link allows you to create "canned" reports on your History records
  - Reports can be run on entire History or a selected subset of records
  - Stats report is a popular report providing a high-level overview of your prospect pool
- The Export Options link allows you to export History records to an Excel or .csv file
  - You can generate an export file for your entire History or a selected subset of records
  - Each record must have an ID number in order to utilize any of the DMS export formats
  - Your Client Service Representative is available to assist with import/export questions

Notes

History Section – Validating Your Results

- To view a prospect's History Profile, simply click on their last name, which appears as a hyperlink
- When viewing data source records, click on the red X to delete
- When validating your results, some points to remember:
  - Use the Quality of Match as a guide; focus on the lowest scores
  - Use time wisely; focus on data sources with the biggest impact, like stocks or real estate
  - Use data sources with a high QOM as points of reference for comparison
- For more information, view the Tips for Validating Your Data document

Notes

DataQuick

- DataQuick provides an additional resource for researching real estate
- Reverse lookup allows you to search by name for the owner of a property
  - Excellent tool for uncovering property held in a trust
  - Add property values search profiles using the Supplemental Rating Information tool
- Select Property Profile and Property History reports to view record information
- Also allows for basic prospecting
  - Search for property owners on an affluent street using reverse lookup

Notes

Dialog NewsRoom

- Dialog NewsRoom allows you to search over 12,000 news publications at once
    - Can search by keyword, journal, company or individual name
    - Focus your search on a specific timeframe to narrow your results
- Search results screen will include links to full text of articles
- Create an alert from the search results screen to receive an email when new articles are available

Notes

Organization Search

- Organization Search is a research tool providing information on companies
- Search by company name to see records listed in the top pane
    - Records will be listed with a grid indicating data source matches
- Click on a record to see detail information in the bottom pane
    - Navigate through data sources using the links at the top of the detail record
    - Click on the Circle of Friends link (**COF**) to see a list of board members for the organization

Notes

Foundation Search

- The Foundation Search tool can be used to search for foundations or nonprofits
- Search for local foundations by city and state or by zip code
  - Use the NTEE code form to narrow your search by mission/area of focus
- Search for information on prospects' family foundations by name to see:
  - Foundation officers
  - Foundation assets
  - Past 990 records listing past gifts
- Also allows for basic prospecting
  - Search for local nonprofits with similar missions to your own
  - Click on foundation records to view past & present board members
  - Search these individuals in FindWealth Online to see if they are viable prospects

Notes

If you have additional questions, feel free to contact

WealthEngine's Client Service department:

(301) 215-5980, option 3

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