

Wealth Identification. It's what we do. Period.

We are the nation's largest aggregator of wealth data on individuals. With a database of over 13 million high net worth individuals, we help you find new affluent customers and target those who are most likely to buy.

With over 20 years of experience in providing wealth identification and prospecting tools that enable organizations to increase sales, WealthEngine helps marketing and business development professionals more effectively segment and target high net worth individuals. Our clients include some of the world's leading companies in luxury goods and services, real estate, private banking and wealth management, travel, hospitality and entertainment, as well as colleges, universities, arts and nonprofit organizations.

Which one is your best customer?



Tom Benton

- Business Owner
- 3 Properties
- Married to Elena Benton
- Income: \$600K
- Owns 85' Benetti yacht
- Donated \$50K to local hospital
- Net Worth: \$42 Million

With WealthEngine's extensive database and profiling tools, you can easily:

1. Identify individuals with the wealth profile that fits your customer criteria
2. Understand the wealth attributes that drive the spending patterns of your current and future customers
3. Segment your customer and prospect universe to increase the effectiveness and ROI of your marketing programs

We combine 35 wealth-related databases to give you a single view into an individual's net worth.

As a marketing or business development professional in the luxury business marketplace, you of course want to know your customers' and prospective customers' net worth, income, lifestyle and spending patterns. You can also benefit from knowing their real estate holdings, philanthropic inclination, business associations, circle of friends and overall wealth profile.

WealthEngine gives you all of this and more, through a single lens.

Deliver marketing results:

- Execute targeted marketing campaigns & sales promotions
- Generate new sales to current clients
- Build your client base
- Improve your marketing return on investment

WealthEngine Helps You Turn Information Into Sales

- 35 databases combined into a single view of wealth
- Wealth information on over 13 million high net worth individuals
- Calculations of estimated net worth for every individual in the database
- Proven customer segmentation analytics
- Effective business development tools

You Decide How You Want to Work with Us:

FindWealth Online

Comprehensive online database tool gives you immediate access to individual custom wealth profiles

Wealth Screening

Update your customer database by screening batches of customer records against our 35 wealth databases

WebExpress Screening

Perform on-demand wealth screens on small groups of customers while they are in-store or planning a visit

Prospect Generator

Systematically build customized prospect lists based on geography and/or wealth triggers

Key wealth identifiers include:

- ✓ **Net Worth**—net worth estimates for every individual in the database
- ✓ **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, vacation homes, where they went to college and graduate school
- ✓ **Real Estate**—including mortgage (1st and 2nd), lender, taxes, sale dates and market, assessed values
- ✓ **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 United States

Identify Wealth and Increase Sales of Your Product

Simply put, wealth identification is what we do. Period. WealthEngine helps clients increase sales and maximize the return on their marketing dollar. For more information, visit our website at www.wealthengine.com.