

FindWealth 8 Rating and Scores

Analytical Scores

Score name	Description	Score Range Values
Total Assets	The total value of all financial and non-financial assets held by a household	Unable to rate \$500MM+ \$100MM - \$500MM \$50MM - \$100MM \$25MM -- \$50MM \$10MM - \$25MM \$5MM - \$10MM \$1MM - \$5MM \$500K - \$1MM \$100K - \$500K \$50K - \$100K \$25K - \$50K <\$25K
Net worth	The difference between total assets and total debt for a household	Unable to rate \$500MM+ \$100MM - \$500MM \$50MM - \$100MM \$25MM - \$50MM \$10MM - \$25MM \$5MM - \$10MM \$1MM - \$5MM \$500K - \$1MM \$100K - \$500K \$50K - \$100K \$25K - \$50K <\$25K
Cash On Hand (formerly Liquidity)	A measure of financial assets that are readily accessible (e.g. checking, savings, money market accounts, etc.	\$500K+ \$100K - \$500K \$10K - \$100K <\$10K Unable to rate
Estimated Annual Donation	A measure of the amount of money a person gives annually to any and all nonprofits in a given year	Unable to rate \$100K+ \$50K+ - \$100K \$25K+ - \$50K \$10K+ - \$25K \$5K+ - \$10K \$1K+ - \$5K <\$1K

Inclination Affiliation

- A measure of philanthropic intent based on affiliations and political giving

Criteria	Rating
FEC Total > 2K & GS Affiliation & Age >=55	Older w/Strong Political & Charitable Affiliation
FEC Total > 2K & All Other Affiliations	Strong Political Support
FEC Total < 2K & Age >=55	Older w/Moderate Political Support
Age >= 55	Older w/out Political Support
FEC Total < 2K & All Other Affiliations	Younger w/Moderate Political Support
All Other Affiliations	Younger w/out Affiliation

Giving Capacity / Estimated Giving Capacity Formulas

- The calculated amount a prospect can give to any and all nonprofits over a 5-year period.

Component	Estimate Model
Income: Uses Income and Age from matching process	Annual Income based on individual or household derived from various sources
Stock	Current Holdings + Sales Transactions directly held in the past 3 years
Real Estate: Searches for real estate range	Current ownership and a “High” level of QOM (QOM 9+)
Pension	Net Assets – for 1 to 5 active participants
Giving: Client data (giving history) plus political contributions	Total life time giving to your organization plus all political donations, including state, federal and 527 special interest groups

Giving Capacity Rating

Rating	Range
1	\$1 - \$1K
2	\$1K - \$2K
3	\$2K - \$3K
4	\$3K - \$5K
5	\$5K - \$7.5K
6	\$7.5K - \$10K
7	\$10K - \$15K
8	\$15K - \$20K
9	\$20K - \$25K
10	\$25K - \$30K
11	\$30K - \$40K
12	\$40K - \$50K
13	\$50K - \$75K
14	\$75K - \$100K
15	\$100K - \$200K
16	\$200K - \$300K
17	\$300K - \$500K
18	\$500K - \$1MM
19	\$1MM - \$5MM
20	\$5MM+

Influence

- Identifies an individuals' influence in the community based on how many boards they are affiliated with, corporate or philanthropic. Based on a scale of 1-4.

1	Top Quartile
2	Upper Middle Quartile
3	Bottom Middle Quartile
4	Bottom Quartile

Propensity to Give – P2G Scores

Identifies the person's giving potential based on exact household matches, overall wealth and financial ability. P2G Scores looks at:

- The predictive value of data sources
- The quality of match to those sources
- The Estimated Giving Capacity

1 0	Extremely well qualified matches. Statistically, they are the most productive group for major gifts and often warrant a specific strategy to qualify and cultivate.
1 1 to 1 5	Highly qualified matches, but the accuracy rate is only 90-95%.
2 1 to 2 5	Qualified matches that have typically matched to above average real estate and possibly another WealthEngine database. P2G 1 and P2G 2 are ideal segments to target for gift clubs and annual fund upgrades.
3 1 to 3 6	Records that match to any WealthEngine database other than real estate. The higher the rating includes individuals who have matched to three or more databases.
4 0	By definition, this includes all other records that have matched to real estate from Lexis-Nexis. Typically, this group represents 40-45% of the records in an organization's donor database, but only generates 4% of the contributions.
5 0	Typically represent 25-30% of all records in an organization's entire screening database and did not match to any WealthEngine databases, generally indicates these are households of modest means, more often than not renters, and generally low profile people in the community.

Matching Process & Quality of Match Scoring

For each wealth database reviewed, a Quality of Match rating (QOM) is calculated, providing a simple tool for validating your results. Matches with a score of 9 or more are exact matches, also identified as a **HIGH** rating; scores between 4 and 8 establish a strong confidence level that the data is a match, also identified as a **MEDIUM** rating and scores of 3 or smaller are identified as a **LOW** rating in which this data will need additional research efforts to either confirm or deny the relation.

Quality of Match QOM Labels

QOM Label	QOM Score
High	9 and above
Medium	4 to 8
Low	0 to 3

Planned Giving Ratings

Bequest	Yes if age \geq 65 and capacity \geq 100,000
Annuity	1 if age \geq 70 & capacity between 100,000 and 250,000 2 if age \geq 70 and capacity > 250,000
Trust	1 if age between 55 and 64 & capacity \geq 700,000 2 if age \geq 65 and capacity \geq 700,000