



# Greater Philadelphia Cultural Alliance WealthEngine User Group

---

May 29, 2013

The background features a large, light green circular shape on the left side, partially overlapping a solid blue area. To the right, there are dark green silhouettes of interlocking gears. The text is centered in the white space between the green circle and the gears.

# Strategies for Using Prospect Research to Grow Major Giving

Presented by:



**Sally Boucher**  
Director of Research  
WealthEngine Institute

# Agenda

Use WealthEngine's FindWealth Online Research Tool to:

- ⚙️ Prioritize and Rank Prospects
- ⚙️ Identify New Prospects
- ⚙️ Right-size Ask Amounts
- ⚙️ Create Confidence in Solicitors

# Prioritize and Rank Prospects

1. Propensity to Give Score (P2G)
2. Data Source Matches and Quality of Match
3. Estimated Giving Capacity Rating
4. Donative History with YOUR Nonprofit
5. Activity History with YOUR Nonprofit
6. Donative History with Other Nonprofits & Political Giving

# Propensity to Give Score (P2G)

Create PDF Create Doc Print Prefs Show Tabs

Search Criteria	
<b>Name:</b>	Joshua S Reichert <a href="#">facebook</a> <a href="#">in</a>
<b>Second Individual:</b>	RebeccaW. Rimel
<b>Address:</b>	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
<a href="#">Charitable Donations</a>	05
<a href="#">Dun &amp; Bradstreet</a>	11
<a href="#">D&amp;B State Business Registrations</a>	00
<a href="#">Foundation Trustees</a>	09
<a href="#">Guidestar Directors</a>	13
<a href="#">Guidestar Foundations</a>	09
<a href="#">Hoover's Business Information</a>	11
<a href="#">Market Guide</a>	11
<a href="#">WealthID Securities Match</a>	09

## #1: P2G Score

This is the first thing to look at as it identifies "pre-qualified prospects."

### Giving Capacity Report

#1

Rating Summary	
<b>P2G Score:</b>	1-0
<b>Gift Capacity Rating:</b>	2
<b>Gift Capacity Range:</b>	\$5,000,000+
<b>Influence:</b>	1
<b>Inclination:</b>	1
<b>Accredited Investor:</b>	N

Planned Giving Ratings			
<b>Bequest:</b>	No	<b>Annuity:</b>	0
		<b>Trust:</b>	1

Aggregate Information			
<b>Total Compensation:</b>		<b>DB Company Value:</b>	147,922,487
<b>Total Charitable Cont.:</b>	3,250	<b>Total Political Cont.:</b>	0

Supplemental Rating Information			
Included	Component	Amount	Description
Estimated Giving Capacity Summary			
		Aggregate Values	Calculated Values
1.	Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424
2.	Stock Component	\$ 665,748	\$ 66,575
3.	Pension Component	\$ 0	\$ 0
4.	Real Estate Component	\$ 0	\$ 0
5.	Giving Component	\$ 6,702,888	\$ 6,702,888
<b>Age Used: 60 (from Market Guide)</b>		<b>Estimated Total Giving Capacity</b>	<b>\$ 6,783,887</b>

# Data Source Matches and Quality of Match

Create PDF Create Doc Print Prefs Show Tabs

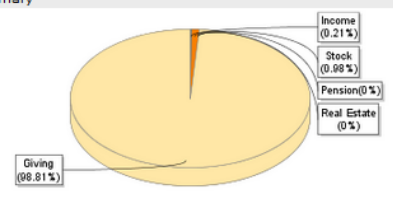
Search Criteria	
Name:	Joshua S Reichert <span>facebook</span> <span>in</span>
Second Individual:	RebeccaW. Rimel
Address:	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
Charitable Donations	05
Dun & Bradstreet	11
D&B State Business Registrations	00
Foundation Trustees	09
Guidestar Directors	13
Guidestar Foundations	09
Hoover's Business Information	11
Market Guide	11
WealthEngine Securities Match	09

# 2

## Giving Capacity Report

P2G Score:	1-0
Gift Capacity Rating:	1
Gift Capacity Range:	\$5,000,000+
Influence:	1
Inclination:	1
Accredited Investor:	N



Planned Giving Ratings			
Bequest:	No	Annuity:	0
		Trust:	1

Aggregate Information			
Total Compensation:		DB Company Value:	147,922,487
Total Charitable Cont.:	3,250	Total Political Cont.:	0
		Property Count:	0

Included	Component	Amount	Description

Estimated Giving Capacity Summary			
		Aggregate Values	Calculated Values
1.	Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424
2.	Stock Component	\$ 665,748	\$ 66,575
3.	Pension Component	\$ 0	\$ 0
4.	Real Estate Component	\$ 0	\$ 0
5.	Giving Component	\$ 6,702,888	\$ 6,702,888
	Age Used: 60 (from Market Guide)	<b>Estimated Total Giving Capacity</b>	<b>\$ 6,783,887</b>

#2: Data Source Matches and QOM

Looking at the sources and QOM to those sources allows you to make a very quick evaluation as to the strength of the prospect.

# Estimated Giving Capacity Rating

Search Criteria	
Name:	Joshua S Reichert <a href="#">facebook</a> <a href="#">in</a>
Second Individual:	RebeccaW. Rimel
Address:	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
Charitable Donations	05
Dun & Bradstreet	11
D&B State Business Registrations	00
Foundation Trustees	09
Guidestar Directors	13
Guidestar Foundations	09
Hoover's Business Information	11
Market Guide	11
WealthID Securities Match	09

## #3: Estimated giving Capacity

While capacity on its own does not mean someone is a good major gift prospect for your organization, it is a necessary component for any major gift prospect to have the means to give a major gift.

### Giving Capacity Report

Rating Summary

P2G Score:	1-0
Gift Capacity Rating:	1
Gift Capacity Range:	\$5,000,000+
Influence:	1
Inclination:	1
Accredited Investor:	N

Planned Giving Ratings			
Bequest:	No	Annuity:	0
		Trust:	1
Aggregate Information			
Total Compensation:		DB Company Value:	147,922,487
Total Charitable Cont.:	3,250	Total Political Cont.:	0
Property Count: 0			
Supplemental Rating Information			
Included	Component	Amount	Description
Estimated Giving Capacity Summary			
	Aggregate Values	Calculated Values	
1. Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424	
2. Stock Component	\$ 665,748	\$ 66,575	
3. Pension Component	\$ 0	\$ 0	
4. Real Estate Component	\$ 0	\$ 0	
5. Giving Component	\$ 6,702,888	\$ 6,702,888	
Age Used: 60 (from Market Guide)			
<b>Estimated Total Giving Capacity</b>		<b>\$ 6,783,887</b>	

#3





# Donative History with YOUR Nonprofit

Create PDF Create Doc Print Prefs Show Tabs

Search Criteria	
Name:	Joshua S Reichert <span>facebook</span> <span>in</span>
Second Individual:	RebeccaW. Rimel
Address:	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
Charitable Donations	05
Dun & Bradstreet	11
D&B State Business Registrations	00
Foundation Trustees	09
Guidestar Directors	13
Guidestar Foundations	09
Hoover's Business Information	11
Market Guide	11
WealthID Securities Match	09

## #4: Donative History with YOUR Nonprofit

### Giving Capacity Report

Rating Summary

P2G Score: 1-0  
 Gift Capacity Rating: 1  
 Gift Capacity Range: \$5,000,000+  
 Influence: 1  
 Inclination: 1  
 Accredited Investor: N

Planned Giving Ratings			
Bequest:	No	Annuity:	0
		Trust:	1

Aggregate Information			
Total Compensation:		DB Company Value:	147,922,487
Total Charitable Cont.:	3,250	Total Political Cont.:	0

Supplemental Rating Information			
Included	Component	Amount	Description

Estimated Giving Capacity Summary			
	Aggregate Values	Calculated Values	
1. Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424	
2. Stock Component	\$ 665,748	\$ 66,575	
3. Pension Component	\$ 0	\$ 0	
4. Real Estate Component	\$ 0	\$ 0	
5. Giving Component	\$ 6,702,888	\$ 6,702,888	#4
Age Used: 00 (from Market Guide)			
	<b>Estimated Total Giving Capacity</b>	<b>\$ 6,783,887</b>	

Only present in FW0 if you have input the information. If not, review the data in your DMS. Look for

- size of largest gift
- date of most recent gift
- total giving
- consecutive years giving and/or
- frequency of giving

# Activity History with YOUR Nonprofit

Search Criteria	
Name:	Joshua S Reichert <span>facebook</span> <span>in</span>
Second Individual:	RebeccaW. Rimel
Address:	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
Charitable Donations	05
Dun & Bradstreet	11
D&B State Business Registrations	00
Foundation Trustees	09
Guidestar Directors	13
Guidestar Foundations	09
Hoover's Business Information	11
Market Guide	11
WealthID Securities Match	09

#5 →

#5: Activity History with YOUR Nonprofit

### Giving Capacity Report

Rating Summary

P2G Score: 1-0  
 Gift Capacity Rating: 1  
 Gift Capacity Range: \$5,000,000+  
 Influence: 1  
 Inclination: 1  
 Accredited Investor: N

Planned Giving Ratings			
Bequest:	No	Annuity:	0
		Trust:	1

Aggregate Information			
Total Compensation:		DB Company Value:	147,922,487
Total Charitable Cont.:	3,250	Total Political Cont.:	0

Supplemental Rating Information			
Included	Component	Amount	Description
Estimated Giving Capacity Summary			
		Aggregate Values	Calculated Values
1.	Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424
2.	Stock Component	\$ 665,748	\$ 66,575
3.	Pension Component	\$ 0	\$ 0
4.	Real Estate Component	\$ 0	\$ 0
5.	Giving Component	\$ 6,702,888	\$ 6,702,888
Age Used: 60 (from Market Guide)		<b>Estimated Total Giving Capacity</b>	<b>\$ 6,783,887</b>

Check your donor management system (DMS) for all activity including

- attendance at productions or exhibits
- events attended
- contacts with major gifts or other personnel
- connections to others involved
- volunteer activity
- etc.

# Donative History with Other Nonprofits & Political Giving

Create PDF Create Doc Print Prefs Show Tabs

Search Criteria	
Name:	Joshua S Reichert <span>facebook</span> <span>in</span>
Second Individual:	RebeccaW. Rimel
Address:	2005 Market Street Suite 1700 Philadelphia, PA 19103

Data Source	QOM
<a href="#">Charitable Donations</a>	05
<a href="#">Dun &amp; Bradstreet</a>	11
<a href="#">D&amp;B State Business Registrations</a>	00
<a href="#">Foundation Trustees</a>	09
<a href="#">Guidestar Directors</a>	13
<a href="#">Guidestar Foundations</a>	09
<a href="#">Hoover's Business Information</a>	11
<a href="#">Market Guide</a>	11
<a href="#">WealthID Securities Match</a>	09

## #6: Donative History with Other Nonprofits and Political Giving

### Giving Capacity Report

Rating Summary

P2G Score:	1-0
Gift Capacity Rating:	1
Gift Capacity Range:	\$5,000,000+
Influence:	1
Inclination:	1
Accredited Investor:	N

Planned Giving Ratings			
Bequest:	No	Annuity:	0
		Trust:	1

Aggregate Information			
Total Compensation:		DB Company Value:	147,922,487
Total Charitable Cont.:	3,250	Total Political Cont.:	0

#6

Included	Component	Amount	Description
Supplemental Rating Information			
Estimated Giving Capacity Summary			

	Aggregate Values	Calculated Values
1. Income Component (from U.S. Census Bureau)	\$ 37,959	\$ 14,424
2. Stock Component	\$ 665,748	\$ 66,575
3. Pension Component	\$ 0	\$ 0
4. Real Estate Component	\$ 0	\$ 0
5. Giving Component	\$ 6,702,888	\$ 6,702,888
<b>Age Used: 60 (from Market Guide)</b>	<b>Estimated Total Giving Capacity</b>	<b>\$ 6,783,887</b>

Even if a prospect has not given to your organization, you can determine if they may be interested in your cause or mission by looking at who else they donate to. Additionally, those who make political contributions are more philanthropic and have more disposable income than those who don't.

# Prioritize and Rank Prospects

1. Propensity to Give Score (P2G)
  2. Data Source Matches and Quality of Match
  3. Estimated Giving Capacity Rating
  4. Donative History with YOUR Nonprofit
  5. Activity History with YOUR Nonprofit
  6. Donative History with Other Nonprofits & Political Giving
- Helps verify “good” prospect**
- Must be above set limit**
- Apply points for donation levels, activity levels, and additional giving. This allows you to rank your prospects by affinity and philanthropy**

# Identify New Prospects

## 1. Review the “Circle of Friends” For Your Best Prospects

Match Summary | More Match Info | Other Addresses | **Circle of Friends** | Source Details

**Giving Capacity Report**

Rating Summary

**P2G Score:** 1-0  
**Gift Capacity Rating:** 1  
**Gift Capacity Range:** \$5,000,000+  
**Influence:** 1  
**Inclination:** 1  
**Accredited Investor:** N

Asset Class	Percentage
Giving	98.81%
Income	0.21%
Stock	0.98%
Pension	0%
Real Estate	0%


**Circle of Friends**

### D&B State Business Registrations

Company	Name	Title
Pct Incorporated <a href="#">in</a>	Bernstein, Henry B	Treasurer
	Campbell, Robert H	Director
	Dahl, Michael J	Secretary
The Pew Charitable Trusts <a href="#">in</a>	Bernstein, Henry B	Treasurer
	Bernstein, Henry B	
	Dahl, Michael J	Secretary
	Dahl, Michael J	Secretary
	Horwitz, Joy A	Secretary
	Horwitz, Joy A	
	Pew, R Anderson	Director
	Pew, R Anderson	
	Rimel, Rebecca	President
Rimel, Rebecca W	President; Director	

# Identify New Prospects

## 2. Look at the Connections of Your Inner Circle/VIP's


Advanced
Simple
Organization
Dataquick
History
Inner Circle
Express
WS UK
NewsRoom
Foundation Search
Prospect Generator
PINPOINT
Preferences
Help
Logout

### Inner Circle List

Page 1 2 3 of 3  
[\[First Page\]](#) [\[Last Page\]](#)

<input checked="" type="checkbox"/>	Last Name	First Name	Business	Address	City	State	Zip	Attribute1	Matches
<input type="checkbox"/>	Nicholson	Thomas Henry	Nicholson Inc Realtors	819 West Little Creek Rd	Norfolk	VA	23505		
<input type="checkbox"/>	Smith	Robert Edward	Nextgen Foundation Charitable Trust	3600 Butler Rd	Glyndon	MD	21071		
<input type="checkbox"/>	Mock	Lawrence Edward	Navigation Capital Partners	3040 Peachtree Rd Ste 1511	Atlanta	GA	30305		
<input type="checkbox"/>	Hagedorn	Robert H	Leaddog	429 E 52nd St Apt 11h	New York	NY	10022		
<input type="checkbox"/>	Weinberg	Jay M		4805 Lockgreen Cir	Richmond	VA	23226	45	<a href="#">Match Report</a>
<input type="checkbox"/>	Friedman	Robert		350 Central Park W Apt 5d	New York	NY	10025	28	<a href="#">Match Report</a>
<input type="checkbox"/>	Markel	Steven A		119 Tempsford Ln	Richmond	VA	23226	23	<a href="#">Match Report</a>
<input type="checkbox"/>	Herson	Selwyn S	S&K Famous Brands Inc	11100 West Broad St	Richmond	VA	23294	22	<a href="#">Match Report</a>
<input type="checkbox"/>	Iger	Robert A		536 N Cliffwood Ave	Los Angeles	CA	90049	12	<a href="#">Match Report</a>
<input type="checkbox"/>	Ellison	Lawrence J		96 Isabela Ave	Atherton	CA	94027	11	<a href="#">Match Report</a>
<input type="checkbox"/>	Crown	Lester	Henry Crown & Company	222 N La Salle St Ste 2000	Chicago	IL	60601	10	<a href="#">Match Report</a>
<input type="checkbox"/>	Gates	William	Bill/Mecinda Gates Foundation/Ceo &		Seattle	WA	98105	10	<a href="#">Match Report</a>
<input type="checkbox"/>	Lane	Robert			Moline	IL	61265	9	<a href="#">Match Report</a>
<input type="checkbox"/>	Buffett	Warren E	Berkshire Hathaway Inc	1440 Kiewit Plaza	Omaha	NE	68131	7	<a href="#">Match Report</a>
<input type="checkbox"/>	Eisner	Michael		411 N Oakhurst Dr	Beverly Hills	CA	90210	6	<a href="#">Match Report</a>
<input type="checkbox"/>	Case	Stephen		4 East 70th St	New York	NY	10021	6	<a href="#">Match Report</a>
<input type="checkbox"/>	Stafford	John Roy	Stafford Communications Inc	497 D Ward Rd	Jonesborough	TN	37659	5	<a href="#">Match Report</a>
<input type="checkbox"/>	Lazarus	Shelly		146 W 79th Street #3a	New York	NY	10024	5	<a href="#">Match Report</a>
<input type="checkbox"/>	Eisner	Michael		411 N Oakhurst Dr	Beverly Hills	CA	90210	3	<a href="#">Match Report</a>
<input type="checkbox"/>	Smith	Brett	Macquarie Mortgages	3001 Communications Pkwy 117	Plano	TX	75093	2	<a href="#">Match Report</a>
<input type="checkbox"/>	Graham	Donald		2028 Hillyer Pl Nw	Washington	DC	20009	2	<a href="#">Match Report</a>
<input type="checkbox"/>	Flatley	Thomas J	Flatley Company	50 Braintree Hill Office Park	Braintree	MA	02184	1	<a href="#">Match Report</a>
<input type="checkbox"/>	Bass	Edward P		201 Main Street #3100	Fort Worth	TX	76102	1	<a href="#">Match Report</a>
<input type="checkbox"/>	Train	Russell E		1801 Kalorama Square Nw	Washington	DC	20008	1	<a href="#">Match Report</a>
<input type="checkbox"/>	Daley	Pamela		240 Harbor Road	Southport	CT	06890	1	<a href="#">Match Report</a>
<input type="checkbox"/>	Katz	Charles J		1178 Hamilton Avenue	Palo Alto	CA	94301	1	<a href="#">Match Report</a>

# Identify New Prospects

## 2. Look at the Connections of Your Inner Circle/VIP's

Lane Robert Moline IL 61265 [Match Report](#)



### Inner Circle Match Report

[← Back](#)

**Inner Circle Member**  
Robert Lane

Moline IL 61265

#### Inner Circle Matches

Last Name	First Name	Address	City	State	Zip	Business	P2G	Rating	Range	Giving Capacity
<a href="#">Killian</a>	John	336 Boylston St	Newton	MA	02459	Verizon	1-0	1	\$5,000,000+	\$13,079,196
<a href="#">Bowles</a>	Erskine	6725 Old Providence Rd	Charlotte	NC	28226		1-0	1	\$5,000,000+	\$258,243,240
<a href="#">Bowles</a>	Erskine	6725 Old Providence Rd	Charlotte	NC	28226		1-0	1	\$5,000,000+	\$258,245,197
<a href="#">Lane</a>	Robert		Moline	IL	61265		1-1	1	\$5,000,000+	\$12,692,235
<a href="#">Edelheit</a>	Susan	9626 Se 34th Street	Mercer Island	WA	98040		1-0	2	\$1,000,000-\$4,999,999	\$2,552,575
<a href="#">Killian</a>	John	336 Boylston St	Newton Center	MA	02459		1-0	1	\$5,000,000+	\$10,722,561
<a href="#">Killian</a>	John	336 Boylston St	Newton Center	MA	02459		1-0	1	\$5,000,000+	\$10,722,561
<a href="#">Daley</a>	Pamela	240 Harbor Road	Southport	CT	06890		1-0	2	\$1,000,000-\$4,999,999	\$1,617,805
<a href="#">Edelheit</a>	Susan	9626 Se 34th Street	Mercer Island	WA	98040		1-0	2	\$1,000,000-\$4,999,999	\$2,552,575

# Identify New Prospects

## 3. Identify “Hot” Spots and Find Names, Addresses and Real Estate Value of Others Who Live There

Search Criteria	
Name:	Bonnie Jane Mccausland <a href="#">facebook</a> <a href="#">in</a>
Second Individual:	.
Address:	1113 Brynlawn Rd Villanova, PA 19085



[Advanced](#) [Simple](#) [Organization](#) [Dataquick](#) [History](#) [Inner Circle](#) [Express](#) [WS UK](#) [NewsRoom](#) [Foundation Search](#) [Prospect Generator](#) [PINPOINT](#)  
[Preferences](#) [Help](#) [Logout](#)



# Identify New Prospects

## 3. Identify “Hot” Spots and Find Names, Addresses and Real Estate Value of Others Who Live There



1 Property Search 2 Select Property 3 Select Reports 4 View Reports

Single Property Search | Multiple Property Search | Saved Searches | Search Summary

### Property Search

For the best search results, enter only partial information (name, or address, etc.).

First Name:  Last Name:

Site Address  Mail Address  Both

City:  State:  ZIP Code:

County:

Assessor Parcel Number/Property Tax ID  
Starting Parcel:  Ending Parcel:

# Identify New Prospects

Displaying Records: 1 - 20  
[First](#) | [Prev](#) | [Next](#)

Select All | Clear All

	Owner Name	Parcel Number/Property Tax ID	Site Address	Mail Address	Score
1	<input type="checkbox"/> VESPER HIGH STREET	160013760003	16 E HIGH ST POTTSTOWN, PA 19464-5427	1100 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
2	<input type="checkbox"/> VESPER HIGH STREET	160015404006	144 W HIGH ST POTTSTOWN, PA 19464-6310	1100 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
3	<input type="checkbox"/> KRANCER,EVELYN	310030106058	8302 OLD YORK RD UNIT# A16 ELKINS PARK, PA 19027-1523	1142 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
4	<input type="checkbox"/> KRANCER,RONALD A	400008108006	1142 BRYNLAWN RD VILLANOVA, PA 19085-2102	1142 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
5	<input type="checkbox"/> MCDEVITT,JOSEPH T & SUZANNE	400008112002	1130 BRYNLAWN RD VILLANOVA, PA 19085-2102	1135 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
6	<input type="checkbox"/> MAIN,G MICHAEL	400008116007	1122 BRYNLAWN RD VILLANOVA, PA 19085-2102	1122 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
7	<input type="checkbox"/> ENDRISS,MARGARET M & VICTORIA M	400008120003	1114 BRYNLAWN RD VILLANOVA, PA 19085-2102	1114 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
8	<input type="checkbox"/> SILVI,GARY & MONIQUE	400008124008	1100 BRYNLAWN RD VILLANOVA, PA 19085-2102	1100 BRYNLAWN RD VILLANOVA, PA 19085-2102	100
9	<input type="checkbox"/> PEGUES,DAVID A & CLARE F	400008128004	1157 BRYNLAWN RD VILLANOVA, PA 19085-2101	1157 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
10	<input type="checkbox"/> BEVAN,MICHAEL J & LARISA A	400008132009	1147 BRYNLAWN RD VILLANOVA, PA 19085-2101	1147 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
11	<input type="checkbox"/> MCDEVITT,SUZANNE J & JOSEPH T	400008136005	BRYNLLAWN RD VILLANOVA, PA 19085	1135 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
12	<input type="checkbox"/> MCDEVITT,JOSEPH T & SUZANNE J	400008140001	1135 BRYNLAWN RD VILLANOVA, PA 19085-2101	1135 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
13	<input type="checkbox"/> GOLDSTEIN,RICHARD I & VICKI M	400008144006	1131 BRYNLAWN RD VILLANOVA, PA 19085-2101	1131 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
14	<input type="checkbox"/> LAVERELL,JUDSON D II & DEBORAH A	400008148002	1127 BRYNLAWN RD VILLANOVA, PA 19085-2101	1127 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
15	<input type="checkbox"/> KOLFF,JACOB & PATRICIA M	400008152007	1125 BRYNLAWN RD VILLANOVA, PA 19085-2101	1125 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
16	<input type="checkbox"/> MEIER,RICHARD A & TRACY L	400008156003	1121 BRYNLAWN RD VILLANOVA, PA 19085-2101	1113 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
17	<input type="checkbox"/> MEIER,RICHARD A & TRACY L	400008160008	1113 BRYNLAWN RD VILLANOVA, PA 19085-2101	1113 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
18	<input type="checkbox"/> RORER,EDWARD C & SARAH B	400008164004	1109 BRYNLAWN RD VILLANOVA, PA 19085-2101	1109 BRYNLAWN RD VILLANOVA, PA 19085-2101	100
19	<input type="checkbox"/> CORCORAN,RICHARD K & KRISTEN L	400008168009	1107 BRYNLAWN RD VILLANOVA, PA 19085-2101	401 GRAND OAK LN EXTON, PA 19341-2088	100
20	<input type="checkbox"/> SKINNER,STEVEN R & KAAREN B	400008172005	1105 BRYNLAWN RD VILLANOVA, PA 19085-2101	1105 BRYNLAWN RD VILLANOVA, PA 19085-2101	100

Select All | Clear All

Select Reports

First | Prev | Next  
 Displaying Records: 1 - 20  
 Save Search

# Right-Size Ask Amounts

- ⚙️ One Common Reason Nonprofits Don't Maximize Their Potential: Leaving Money on the Table by Not Asking For Enough

Base your ask on:

- ✓ Capacity
- ✓ Type of Ask - Membership, Annual Fund, Major Gift, Capital Gift
- ✓ Funding Priorities and Donor Area of Interest
- ✓ Gauge where you are on the prospects priority list
- ✓ Is this a one-year ask or multi-year pledge?

# Create Confidence

- ⚙️ Those Asking for Gifts, whether MGO's, Board Members, Volunteers, Senior Leadership, or others, will gain confidence when they know that suggested ask amounts are based on data and analysis.
- ⚙️ Gut "instinct" can play a role. Always trust a front-line fundraiser's feel for the right ask amount, but having data to back up capacity can help solicitors overcome their fears and lead to higher asks on average
- ⚙️ You can use a standard formula to adjust WealthEngine capacity estimates to your organization's "starting ask amount."

# Create Confidence

Example: WealthEngine Estimated Giving Capacity:  
\$250,000 (maximum to all charities over a 5-year period)

Assumptions:

- “We are one of five charitable priorities”  $\$250K \div 5 = \$50K$
- “We are asking for a one-year commitment”  $\$50K \div 5 = \$10K$

Adjustments:

- “This prospect loves us” adjust ↑
- “This prospect has little connection to us” adjust ↓
- “This prospect has children in college” adjust ↓
- “This prospect has given larger gifts to similar causes” adjust ↑

The background features a large, light green circular shape on the left, partially overlapping a darker green area on the right. The right side of the image contains silhouettes of interlocking gears. The overall color palette is composed of various shades of blue and green.

Questions?

---

# Contact Us!

If you'd like to learn more about how you can implement data driven solutions in your nonprofit, contact us!

**WealthEngine**<sup>TM</sup>

800.933.4446

[www.wealthengine.com](http://www.wealthengine.com)

[info@wealthengine.com](mailto:info@wealthengine.com)

*Join the [WealthEngine Institute](#) for Free Education and Networking*