

# A *fresh* Approach to Wealth Screening

iWave's screening is built on a foundation of customization and transparency that is the first of its kind. It enables development departments to segment hundreds or thousands of individuals you know very little about into a prioritized list of prospects with the greatest capacity *and* inclination to donate a major gift to *your* organization.



For decades, wealth screening has been expensive, provided incomplete and quickly out-of-date data, offered inaccurate prospect ratings with many false positives, and took weeks to return results. That story is changing, with iWave.

iWave's screening provides a fresh approach, giving you confidence that you're asking the right person, for the right amount, at the right time.

## What Makes it Different?

Here are a few of the ways iWave is changing the game:

### 360° VIEW

Get a comprehensive view of your prospect, focusing not only on an individual's capacity but also their propensity to give, and affinity to *your* cause.



### TRANSPARENCY AND CUSTOMIZATION

Have confidence in the results because scores are completely transparent and tailored specifically to your organization. iWave shows you how scores were derived and what records were matched.

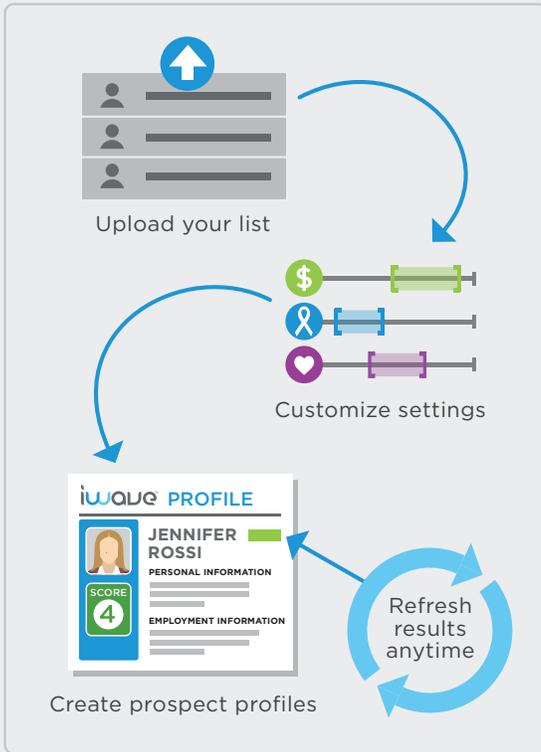
### FAST RESULTS

Results are returned in minutes or hours rather than days or weeks.



### CURRENT DATA

Profiles stay up-to-date because you can add new information and refresh results at any time.



## How Does it Work?

iWave's screening works by matching individuals to information in iWave's database: the industry's most comprehensive source of wealth, philanthropic and biographic records. It's a simple 4-step process:

1. Upload a list of individuals to screen for wealth and philanthropic indicators.
2. Customize settings to your organization's specific fundraising goals. For example: major gift ranges, strictness of matching filter, weighting of key components (propensity, affinity, and capacity), and the cause you want to find prospects connected to.
3. With one click, create profiles for top major gift prospects that have been identified.
4. Validate and refresh results any time within iWave.

## What Information is Generated?

Not only does iWave screen each individual across iWave's 1 billion records to generate an overall score, it also gives you the opportunity to incorporate your internal giving data to generate a recency, frequency, and monetary (RFM) score for each individual. Together these scores paint a comprehensive picture of an individual's major gift potential. Other information returned includes: propensity, affinity, and capacity ratings, estimated capacity value, real estate holdings, charitable giving history, and board affiliations.



Before using iWave's screening I was individually researching thousands of people. It was really slow and involved a lot of guess work. Now I can screen prospects across all kinds of data and pinpoint the top percentage who come back above a certain threshold—that takes half an hour. **iWave's screening has helped us exceed our fundraising goals every year.**



**Ryan Marshall**  
Prospect Development Analyst, Concordia University St. Paul

YOU'RE IN GOOD COMPANY  
WITH iWAVE



### About iWave:

iWave is the industry's top-rated fundraising intelligence platform. Our solutions help education, healthcare, and nonprofit organizations determine who to ask, how much to ask for, and when to ask so they can fundraise with confidence. Since 1991, over 6,000 development teams have used iWave to power their fundraising efforts.