

## WealthEngine and Bentz Whaley Flessner Team Up to Provide Integrated Prospect Research and Analytics to Higher Education, Healthcare and Nonprofit Organizations

### *Leaders in their Respective Disciplines Address the Need for More Sophisticated Fundraising*

Bethesda, MD (October 20, 2009) – WealthEngine, a leading provider of sophisticated prospect research tools and screening services, announced today that it has teamed up with fundraising consulting firm, Bentz Whaley Flessner, to provide the market's most comprehensive and effective analysis of giving capacity and propensity.

For more than 18 years, WealthEngine has been helping higher education, healthcare and nonprofit organizations understand the giving capacity of their donors and identify prospective future donors through its comprehensive wealth screening capabilities. Today, more than 2000 organizations rely on WealthEngine's wealth identification and verification tools for their donor and prospect research.

Bentz Whaley Flessner's analytics division, DonorCast, founded by Joshua Birkholz, principal of Bentz Whaley Flessner and author of *Fundraising Analytics*, specializes in custom-engineered analytics and data mining training that provide nonprofit organizations with important insights into the giving patterns among their own donors across a spectrum of fundraising programs. DonorCast uses predictive modeling and statistical analysis to increase the sophistication of fundraising programs and to point their efforts to the greatest opportunities for success.

"We have proven to be a solid combination as our clients already respect the tremendous value WealthEngine and Bentz Whaley Flessner deliver within our own respective disciplines of prospect research and modeling," said Tony Glowacki, chief executive officer of WealthEngine. "In fact, working together, we recently won engagements at two major universities in the Midwest. By formalizing our partnership going forward, institutions can benefit from our integrated approach to wealth identification, prospect segmentation and predictive modeling."

Through this integrated approach, WealthEngine will comprehensively screen an institution's records for wealth qualification and giving capacity. WealthEngine's screening across 30 databases provides the capability to quickly identify and focus on the best major gift prospects. It also provides the capability to further segment the results to identify opportunities for annual appeal upgrades. DonorCast will then incorporate the wealth screening results and constituent information from the client's database to perform highly customized predictive modeling on all individual records in the database.

"The goal is to identify and segment the best prospects for each institution by using the latest in capacity and propensity analysis, thereby providing transformative change to our clients' prospect development efforts," said Joshua Birkholz director of DonorCast. "Our unique "screen then model" approach arose from the many requests of prospect research and development professionals uncomfortable with pre-filtering screening by demographic modeling. Together with WealthEngine, we're answering the call for these proven approaches that yield measurable results."

### **About WealthEngine**

WealthEngine is a leading provider of sophisticated prospect research and analytics to nonprofit organizations and institutions of higher education, financial services firms, and other for profit organizations. More than 2000 clients use WealthEngine's products for comprehensive prospect research on individuals, companies and foundations. Headquartered in Bethesda, Md., WealthEngine offers products in both the United States and the United Kingdom. For more information, visit [www.wealthengine.com](http://www.wealthengine.com).

## **About Bentz Whaley Flessner**

Bentz Whaley Flessner is a full-service consulting firm dedicated to helping leading nonprofit organizations build strong institutional advancement programs and execute successful campaigns. Since 1983, Bentz Whaley Flessner has provided counsel and assistance for every step of the development process. DonorCast, the firm's analytics division, offers the most comprehensive custom analytics services for fundraising.

For more information, visit [www.bwf.com](http://www.bwf.com).