

# Wealth Intelligence

IDENTIFY and ENGAGE

the largest UK database of the wealthy



**action**   
**planning**  
let's start from here

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strategy and fundraising consultants

identify...

## ...your wealthy donors

**Wealth Intelligence** is a unique service from Action Planning, which gives you everything you need to develop successful campaigns for major donors, planned giving or legacies.

### Wealth Intelligence gives you:

- access to the UK's largest factual database of the wealthy, containing over 240,000 names and operated by our partners, Prospecting for Gold
- advanced data analysis software
- the skills, experience and consultancy support of Action Planning

Wealth Intelligence contains up-to-date factual information on the wealth of over 240,000 people. Further information continues to be collected daily and 1000 new records are being added to the database every month.

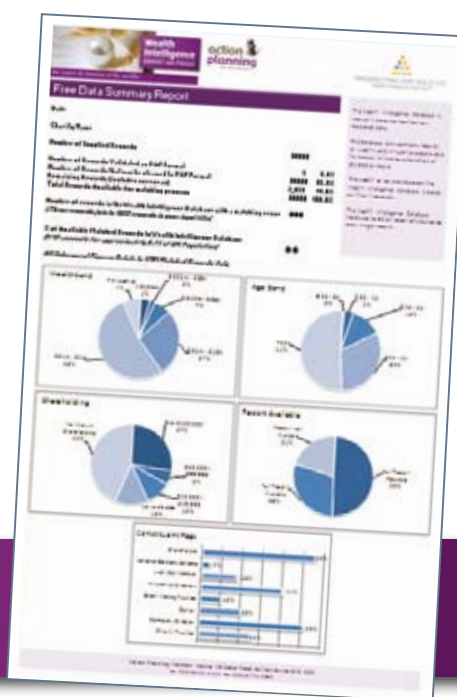
**Getting Started:** You can start with a free data summary to uncover the potential of your database.

We screen your donor and contact lists against this wealth database in order to identify those of your supporters with the capacity to make a sizable donation or bequest to your cause. Wealth Intelligence uses sophisticated data analysis software and is a powerful tool for real time data mining, profiling and selection.

We can also generate new names; wealthy people with an affinity to your cause.

The database holds 12 primary attributes which include details on:

- wealth bands and profiles (from £1m to £50m+)
- investment types, histories and profiles
- directorships, business information and networks
- philanthropic and charitable involvement and giving
- socio and geo-demographic details



### Wealth Intelligence information is available at different levels:

**Screen and Analyse:** Identify and prioritise the wealthy people within your database. Includes Preliminary Report.

**COST:** £500

**Wealth Tags:** Identifies the wealthy people in your databases.

**COST:** £3 per name.

**Snapshots:** An overview including wealth band, region, age, charity and investor interests.

**COST:** £8 per name, reducing to £5 per name if you have already purchased the wealth tag.

**Standard Profile:** Hard and soft information about each individual, including professional details, known charitable donations, social networks and earnings.

**COST:** £75 per profile, reducing to £67 if you have already purchased their snapshot.

**New Names:** Lists wealthy people not currently on your database, but with interests that suggest they may be sympathetic to your cause. Includes name, address and reason for selection.

**COST:** £45 per name.

All charges listed are subject to VAT.

engage...

## ...the wealthy as donors

Identifying a list of wealthy contacts is one thing. Using it effectively to engage new major donors is another.

That is why Action Planning's Wealth Intelligence service goes far beyond wealth screening. We work alongside your team, giving you the support and confidence to approach potential major donors at the right time, in the right way, with a proposition tailored to their interests.

### Reviewing your readiness to fundraise

Action Planning will explore your potential to raise funds from the wealthy. We will look at:

- the need and justification for major donations
- the strength of your proposition
- your high value donations to date
- your current donor recruitment and development process
- how you manage your donors

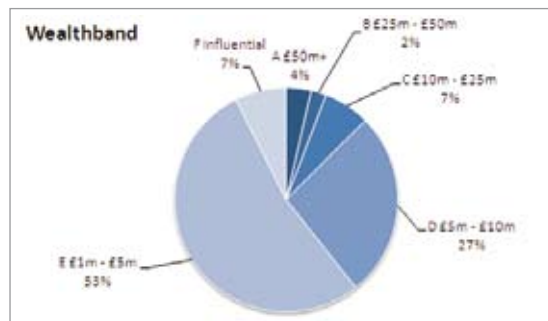
We will meet your team, review your progress and provide a written evaluation of your potential and our recommended next steps.

### Identifying your existing networks

Cold major donor prospecting may identify people with the capacity to give but relationships are needed to open the door and secure support for your cause.

We start by identifying the networks to which you already have access, working with your senior staff and trustees to map potential contacts who could be of value to the organisation.

We will check their ability to give, preparing an assessment of your potential to successfully run a major donor campaign and the next steps that you will need to take.



Examples of supporters' wealth & characteristics

### Defining your major donor fundraising approach

Action Planning will work with you to develop a powerful and compelling proposition. We will help you prioritise your approaches, establishing development plans – a 'living document' for each donor to inform your approach. We will ensure that your data and record keeping systems are in place.

### Mentoring you to ask

Action Planning will mentor you - either individually or in groups - to make a successful ask. We will build your confidence by accompanying you to meetings, if necessary. We can review your progress by providing debriefing sessions on an individual or team basis.

### Contracting out the work in full

All potential major donors should ideally be approached directly by a representative of your organisation but, if capacity is an issue, Action Planning's experienced consultants can talk to potential major donors on your behalf.



## Next Steps:

Phone Action Planning:

**020 8642 4122**

or email:

[wealth@actionplanning.co.uk](mailto:wealth@actionplanning.co.uk)

# Move forward with Action Planning

Whatever challenges and opportunities your organisation is facing, Action Planning can help with the next stage of your journey.

As a leading UK consultancy to the not-for-profit sector, we have helped hundreds of organisations to raise capital and revenue funding, recruit key people and plan ahead. We work alongside our clients, helping each to make the journey in their own way, and at their own pace.

Our staff have senior-level third sector experience in a range of disciplines and work as a team to deliver practical solutions to client needs.

We provide a combination of advice and 'hands on' implementation for capital appeals, revenue fundraising and bid-writing, research, strategic consultancy and recruitment for senior posts.

Action Planning operates internationally, both in Europe through our membership of EU Consult and in the United States, where we have an associated office in Boston.

We also work closely with ACEVO and key funders to organise the largest UK events for third sector leaders.



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In partnership with:



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