WE INSIGHTS FOR SALESFORCE

Gain a 360° View of Your Contacts Right in Salesforce

with these attributes on demographics, real estate, giving & wealth

Contact & Business Info

- Business Address
- Business Email
- Business Phone
- Business Title
- Business/Organization Name
- Business/Organization Type
- Personal Email
- Personal Phone

Demographics

- Name
- Address Street
- City
- State
- Postal Code
- Age Used
- Children Flag
- Gender
- Spouse Name
- Marital Status

Wealth

- Net Worth
- Income
- Cash on Hand
- Pension
- Direct Stock
- Total Stock
- Estimated Gift Capacity
- Gift Capacity - Giving
- Gift Capacity - Income
- Gift Capacity - Pension
- Gift Capacity - Real Estate
- Gift Capacity - Stock
- Real Estate Value
- Property Count
- Board Member
- Major Donor
- Inner Circle Member
- Company Ownership
- Company Sales Volume
- Airplane Owner
- Boat Owner
- Political Contributions
- Charitable Contributions

Ratings

- Estimated Annual Donation
- Total Assets
- Influence
- Influence Quartile
- Inclination - Affiliation
- Inclination - Giving
- Inner Circle Match
- P2G Score
- P2G Score2
- P2G
- P2G Description
- Annuity
- Trust
- Bequest
- Recency
- Frequency
- Money
- RFM Total

Quality of Match Score is returned on specific data sources.

Contact us at

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WEALTHENGINE®