
New Wealth Screening tool - Windfall

- Integrates with Neon
- Provides 22 new wealth indicators on current and prospective donors with net worth > \$1MM
- 3-year contract with Cain Center

Windfall Data Differentiation



- ✓ Focus on net worth for US households, especially for the affluent (\$1MM+)
- ✓ Modeled at a household level based on deterministic inputs
- ✓ Precise net worth estimates that do not cap out at an upper limit or have broad ranges
- ✓ Data is refreshed on a weekly basis
- ✓ Business model: unlimited records & refreshes

Traditional Data Vendors:

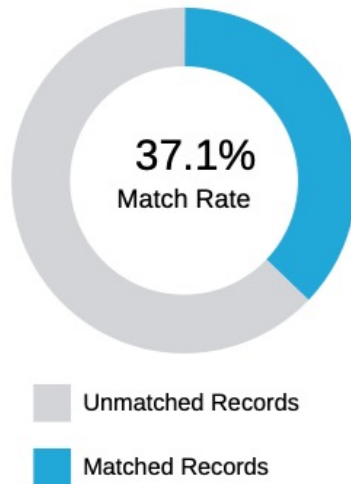
- ✗ Underlying data is limited to a zip+4 and relies heavily on survey and census data
- ✗ Most net worth estimates come in ranges and are capped at a certain figure (i.e. not precise figures)
- ✗ The data is refreshed infrequently leading to fairly stale data that may miss wealth creation / destruction events
- ✗ Given data methodology can lead to downstream issues with modeling efficacy

Windfall Wealth Indicators available to Cain Center

- Windfall ID
- Net Worth
- Net Worth Low Bound
- Net Worth High Bound
- Net Worth Calculation Date
- Recent Mover
- Recently Divorced
- Recent Death
- Recent Mortgage
- Political Party Affiliation
- Political Donor
- Top Political Donor
- Boat Owner
- Plane Owner
- Philanthropic Giver
- Philanthropic Cause
- Philanthropic Focus
- Multi-Property Owner
- Foundation Association
- Foundation Officer
- Trust Association
- Nonprofit Board Member
- Match Confidence
- SEC: Money in Motion
- Luxury Car Owner
- Imported Car Owner
- Liquidity Trigger: Wealth Creation
- Small Business Owner

Windfall Preliminary Scan of Cain Center Donors

Matched Households: \$1MM+ of Net Worth



Windfall provides this report anytime we sync with your data to help you understand our match rate.

In addition, you will find relevant statistics that gives you a better insight of your overall constituent base and where you are doing well and where there are opportunities to improve.

If you have any questions, please let your [customer success team](#) know!

Sync Details

Latest Upload Date:	April 29, 2021
Number of Constituents:	1,961
Affluent Constituents:	728
Duplicate Affluent Households:	45
Total Donations Processed:	\$12,686,905

We provide this report on all of the data that we received from your organization. The information above summarizes the data that has been submitted to Windfall.

Windfall Preliminary Scan of Cain Center Donors

Constituent Insights by Group

Net Worth Range	Number of Donors	% of CRM	Total Donations	Donations as % of \$1MM+	Donations as % of Total
\$1 Million - \$2.5 Million	274	14.0%	\$6,364,296	65.7%	50.2%
\$2.5 Million - \$5 Million	210	10.7%	\$569,784	5.9%	4.5%
\$5 Million - \$10 Million	146	7.4%	\$410,032	4.2%	3.2%
\$10 Million - \$20 Million	74	3.8%	\$260,884	2.7%	2.1%
\$20 Million+	24	1.2%	\$2,082,313	21.5%	16.4%
Total	728	37.1%	\$9,687,312	100.0%	76.4%
Unmatched	1,233	62.9%	\$2,999,593	N/A	23.6%