

# DonorScape® Wealth Screening Data Sources

DONORSCAPE® matches prospects against twelve publicly-available databases (listed below) to establish the Gift Capacity Rating.

## Financial Information

Data Source	Description	Use	Search Content	Updated by GG+A
<b>Lexis-Nexis</b> Real Property Records, distributed by IDM Data Services	Lexis-Nexis is one of the leading national compilers of real property and land data and contains information on over 70,000,000 properties across the United States.	Identifies ownership of real estate, including multiple-property ownership. Special GG+A match logic identifies homes and commercial buildings held in trusts.	Over 100,000,000 properties	Updated Quarterly
<b>Larkspur SEP/Keogh Pensions</b>	Larkspur SEP/Keogh provides information on deferred income of self-employed individuals and over two and a half million qualified pension plans.	Identifies a significant asset among self-employed individuals. Especially valuable for identifying bequest and annuity prospects.	2,500,000 plans	Updated Annually
<b>Market Guide Insider Profiles (Reuters)</b>	Reuters Market Guide collects in-depth information on over 10,000 public U.S. companies. It also provides additional information from proxy statements for SEC insiders and collects and summarizes information on individual sectors or industries of the US economy from regulatory filings and corporate annual reports.	Identifies public company leaders, often including detailed biographical, company, and compensation information.	300,000 insiders	Updated Monthly

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<b>EDGAR Online SEC Insiders</b>	<p>The EDGAR Online database displays SEC insider trader transactions and current holdings, for stocks as well as for options and other derivatives as reported on Forms 3, 4, and 5. DonorScape® also provides alerts regarding proposed sales reported on Form 144. The information is collected to comply with the regulatory requirements of the Security and Exchange Commission (SEC). Individuals who meet one of the three conditions below, relating to a person's holdings or position within a public-traded company, must provide information to the SEC whenever they make a stock transaction. The transactions which must be reported relate to stock only with the qualifying company.</p> <ul style="list-style-type: none"> <li>• Owners of 10% or more of the voting shares of a publicly-traded company stock</li> <li>• One of the top five most highly paid employees earning in excess of \$100,000 per year</li> <li>• Officer or Director of a publicly-traded company</li> </ul>	<p>Identifies assets among public company insiders.</p>	<p>Over 1 million transactions</p>	<p>Updated Daily</p>

## Giving and Philanthropic Affiliation

Data Source	Description	Use	Search Content	Updated by GG+A
<b>iWave VeriGift</b>	VeriGift is the fastest growing and most up-to-date database of individual, corporate, and foundation charitable gifts in the industry. Make more educated major gift asks, predict future giving, and determine prospect affinity, by better understanding prospect past philanthropic giving to nonprofit organizations. VeriGift upgrades its database by more than two million new records each month, making VeriGift data a leading source for giving analytics.	Identifies donors to other organizations, including size and year of gift.	100+ million records	Updated Quarterly
<b>Federal Election Campaign Donors</b>	Actual financial disclosure reports filed by the House, Senate, presidential campaigns, political parties, and political action committees (PACs) from 1993 to the present. Also provides links to view the actual financial reports filed by campaigns and committees.	Identifies political and business affiliations. Also excellent for identifying leadership annual giving prospects.	20mm contributions	Updated Quarterly
<b>GuideStar Nonprofit Boards of Directors, Public and Private databases</b>	GuideStar, the national database of U.S. charitable organizations, gathers data on more than 850,000 IRS-recognized non-profit organizations known as 501(c)(3) organizations. GuideStar accesses the IRS Form 990 filed by organizations that report on the operations and finances of charities, as well as form 991 filings for personal, family, and corporate foundations.	Identifies individuals serving on nonprofit boards, as well as individuals acting as trustees of charitable foundations.	Over 1,800,000 non-profit organizations and private and family foundations	Updated Annually

## Biography

Data Source	Description	Use	Search Content	Updated by GG+A
<b>Acxiom Individual Household Profile</b>	Acxiom data is compiled from census data, statistical modeling, self-reported sources such as survey and warranty information, and government sources such as assessment records and motor vehicle registries.	Identifies key demographic characteristics such as presence and age of children, and wealth indicators such as estimated income and home value. Excellent for identifying potential among prospects less likely to appear in business-oriented sources.	105,000,000 households	Not Applicable

Data Source	Description	Use	Search Content	Updated by GG+A
<b>CorpTech Business Profiles</b>	CorpTech provides detailed information on private technology company executives.	Identifies business ownership, equity, and leadership positions within the technology segment of privately owned businesses.	600,000 executives at over 95,000 technology companies	Updated Quarterly
<b>D&amp;B (Dun &amp; Bradstreet) Business &amp; Executive Information</b>	<p>D&amp;B (Dun &amp; Bradstreet) Business &amp; Executive Information includes full Dun Marketing Identifier (DMI) file of business records with contact names and titles, D&amp;B Executive at Home address records, and D&amp;B Biographical Records.</p> <p>D&amp;B makes over 100,000,000 telephone calls annually in order to verify and update data on privately and publicly owned businesses. Information is also gathered via government registries, courts &amp; legal Filings, corporate financial statements, payment data, news and media sources, and yellow page directories.</p>	Identifies business ownership, equity, and leadership positions in public and private companies. Also often includes personal biographical information, such as educational background and prior corporate experience.	Over 13,000,000 D&B business records with contact names and titles, 8,000,000+ D&B Executive at Home address records, and 1,000,000+ D&B biographical records	Updated Quarterly
<b>Marquis Who's Who Biographies</b>	The Marquis Who's Who family of more than 15 directories, including Who's Who in America®, provides concise biographies of over 900,000 leaders and achievers from around the world and from every significant field of endeavor.	Provides extensive biographical details.	1,400,000 profiles	Updated Quarterly

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<p><b>PRIZM® Lifestyle Segments</b> from Claritas</p>	<p>Claritas PRIZM® Lifestyle Segments are today's most reliable and widely used marketing segmentation codes. PRIZM® segments residential areas according to ZIP + 6 postal geography and precisely describes an individual's household.</p>	<p>PRIZM® Lifestyle Segments combine demographic and consumer behavior data to help you identify, understand, and target your prospects. Defining every household in terms of 60+ demographically and behaviorally distinct types, or "segments," PRIZM® helps you learn about their likes, dislikes, lifestyles, and consumer behavior, so that you can better understand and target your prospects.</p>	<p>Nearly every U.S. address</p>	<p>PRIZM® NE (New Edition) clusters were used prior to March 2018.</p> <p>PRIZM® Premier clusters are used after March 2018.</p>