

# WEALTH AND RATINGS

## Job Aid

### WHAT IS THE WEALTH AND RATINGS PAGE?

Wealth and Ratings is a page view within ABE CRM that provides both wealth-related information—real estate, stock investments, business assets and income/compensation—as well as constituent scores and ratings, including likelihood, gift capacity estimate and gift capacity rating.

Capacity ratings and estimates help prioritize prospects, since it's helpful, when dealing with big lists of individuals, to focus first on the ones who have the greatest capacity and chance to make a gift.

Gift capacity approximates a prospect's philanthropic ability to give by examining assets, giving history and other sources of estimated wealth. This estimate can provide a baseline for an ask amount, a number that naturally becomes more precise when informed by a development officer's field qualification and conversations with the prospect. Likelihood helps signal the probability of making a specific type of gift—major, planned, leadership level—and reflects personal characteristics, giving behavior, and engagement behavior in its calculation. Likelihood scores range from 1—the top tier and most likely to make a gift—to 9, the lowest bucket and least likely.

### HOW TO ACCESS A CONSTITUENT'S WEALTH AND RATINGS

1. Log in to [ABE CRM](#).
2. Navigate to a constituent record.
3. Under More information on the left panel, click **Wealth and ratings**.

### HOW TO INTERPRET WEALTH AND RATINGS

A constituent's Wealth and Ratings page includes two tabs, each displaying information about the wealth and associated categories of the chosen household.

Link Tank

Notifications: "" and "Home". Click here for more information.

Wealth Summary | Model Scores | Assets | Giving | Affiliations | Biographical Information | Social Summary

**Wealth summary (Screened: 12/14/2015)** [Get WealthPoint screening](#) [Disable WealthPoint](#) [View Data Refreshed](#)

Assets	Total identified	Confirmed	Other indicators	Total identified	Confirmed
Real estate:	\$2,439,203	\$2,059,000	Wealth indicators:	121	1
Businesses:	\$0	\$0	Biographical data: <b>NEW</b>	4	0
Securities:	\$3,161,977	\$599,879	Political donations:	327	0
Income/compensation:			Philanthropic gifts:	436	0
Other assets:			Nonprofit affiliations:	63	0
<b>Total assets:</b>	<b>\$5,601,180</b>	<b>\$2,658,879</b>	Foundation affiliations:	1	0

**Giving capacity (System)** [Confirm and lock](#) [Edit](#)

Capacity formula: Asset Analysis

Estimated wealth: \$250,001 - \$500,000 (\$358,323)

Major giving capacity: \$250,001 - \$500,000 (\$358,323)

Overall rating:

**Asset distribution for [Name]**

Confirmed

**Model scores and ratings (7)** [View all 10](#) [More](#)

Name	Score	Maximum score	Updated on
Likelihood Rating - Major Gift - Individual	1 Top 0.1%		1/1/2017
Likelihood Rating - Major Gift - Household	1 Top 0.1%		1/1/2017
Likelihood Rating - LAG - Individual	1 Top 0.1%		11/22/2015
Likelihood Rating - LAG - Household	1 Top 0.1%		11/22/2015
Likelihood Rating - Gift Planning - Individual	1 Top 0.1%		1/1/2017
Likelihood Rating - Gift Planning - Household	1 Top 0.1%		1/1/2017
Individual Gift Capacity Estimate	\$51,665,330.25		8/10/2016

**Research details** [Edit](#) [Flag prospect](#)

Research status: Confirmed [Research summary](#)

Prospect manager:

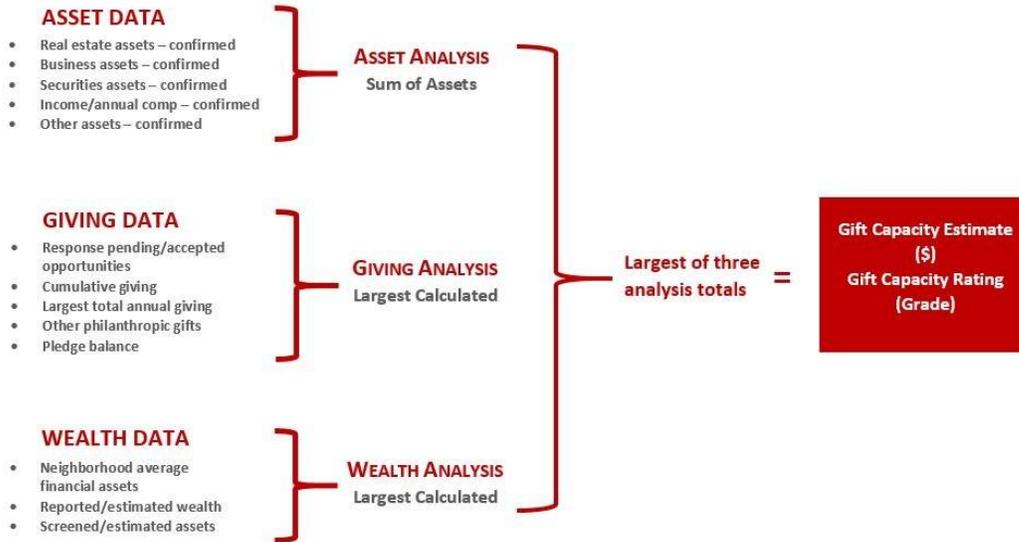
Lists associated to:

Pre-ABE Research Report Exists  
MARIANNES  
2013-07-12

Screened date	This date denotes when the most recent screening occurred.
Assets	Wealth owned by the constituent or spouse broken into real estate holdings, businesses, securities, income/compensation, and other assets.
Total identified assets	The wealth screening attempts to match the constituent with publicly available wealth information, based on things like name; what comes back from the screening is categorized as "Total identified." However, it's worth remembering that, depending on the popularity of the name or whether the property is owned or rented, these "identified" assets may or may not be correctly attributable to the prospect.
Confirmed assets	Assets show up in the "Confirmed" category for one of two reasons: 1) they are automatically confirmed if the assets can be tied to the constituent with a certain set of strict match codes; or 2) Research has gone into the record, "hand-validated" the assets, and confirmed them.

## HOW TO INTERPRET GIFT CAPACITY

Gift capacity examines three pieces of data for a particular constituent—assets, giving, and general wealth data—and adds up the totals for each of these data sources. The gift capacity estimate is then the largest of these three source subtotals:



Gift capacity estimate	A prospect's estimated ability to give, calculated as a raw dollar amount. <i>Gift capacity calculation shown above.</i>
Gift capacity rating	The letter grade bin the prospect's estimated gift capacity dollar amount falls into:  A \$5M+ A- \$1M - \$4,999,999 B \$500,000 - \$999,999 B- \$100,000 - \$499,999 C \$25,000 - \$99,999 D \$10,000 - \$24,999 E \$2,500 - \$9,999 F \$1 - \$2,499 U Unrated (non-donors, companies)  Capacity ratings reported as <b>Individual</b> <b>Or</b> <b>Household</b>
Individual gift capacity	An individual's capacity to give a gift over five years.
Household gift capacity	Household gift capacity simply looks at the capacity of spouse A and spouse B, and takes the larger of the two.

## HOW TO INTERPRET LIKELIHOOD

Likelihood	<p>Likelihood ratings are unit-agnostic; in other words, they help us determine who is most likely to give to the university, not necessarily to a specific school or department. They are dynamic, refreshing weekly.</p> <p>Likelihood is ranked from 1 to 9, with the least likely to make a particular type of gift being in a higher numbered bucket. These buckets, when paired with gift capacity, point us to the right people to talk to first:</p> <ul style="list-style-type: none"> <li>• 1 Top 0.1%</li> <li>• 2 Top 0.25%</li> <li>• 3 Top 0.5%</li> <li>• 4 Top 1%</li> <li>• 5 Top 2.5%</li> <li>• 6 Top 5%</li> <li>• 7 Top 10%</li> <li>• 8 Top 25%</li> <li>• 9 Lower 75%</li> </ul>
Major Gift rating	A constituent's probability that their largest gift, in the next five years, will be between \$25,000 and \$499,999.
Leadership Annual Gift rating	A constituent's probability that their largest gift, in the next five years, will be between \$1,000 and \$24,999.
Planned Giving rating	A constituent's probability that they will give a planned gift. This is the only model score that doesn't tie to specific predicted gift amount; it's simply the likelihood of the gift itself.

### Things to Remember

- Capacity estimates and ratings are—and should be—fluid; they will change as DoDs learn more from qualification and cultivation efforts. Please share any information you have about a prospect's capacity with the Research and Prospect Management (RPM) Team.
- Capacity estimates are based on giving capacity over five years, because WFAA considers major gifts to be payable in installments over a five-year period.
- Data updates occur overnight, not in real time.