

# Identify, understand, and engage the right investors

Windfall drives revenue by targeting the right people and surfacing hard-to-find insights.

## The Windfall Difference

Windfall's precise net worth data and deterministic consumer attributes enable you to uncover your target audience of affluent investors. Gain a deep understanding of their wealth profile and investor interests, so you can intelligently engage and convert them across channels with the right message.



## Windfall's Coverage

**90M<sup>+</sup>**

US Households

**18.1M**

Affluent Households

**71T<sup>+</sup>**

Total Wealth Tracked

## Example Use Cases



### Analyze Share of Wallet

Leverage Windfall to measure how much of their wealth consumers are investing with a given financial institution.



### Determine Probability of Investment

Windfall builds bespoke models to measure prospect's propensity to invest at a certain amount.



### Segment and Analyze Investors

Truly understand most valuable investors by creating and analyzing segments based on wealth, location, and more.



### Lead Acquisition

Use Windfall data and business model to scale across social, digital, offline, and TV channels.

## How it Works

Windfall identifies your most profitable customers across your systems, surfaces critical insights, and fuels cross-channel campaigns to supercharge marketing ROI.

## Selected Key Attributes

### Financial

- Precise net worth
- Home value
- Household debt
- Loan-to-value ratio
- Investment interests
- SEC money-in-motion
- Investable assets
- Accredited investor
- Trust association

### Liquidity Indicators

- Auto make/model
- SMB owner
- Multi-property owner
- Investment properties
- Boat owner
- Plane owner
- Recently divorced
- Recent mover

### Investor Affinity

- Philanthropic cause
- Philanthropic focus
- Philanthropic donor
- Family foundation
- Foundation officer
- Political affiliation
- Political donor
- High end travel
- Luxury affinity

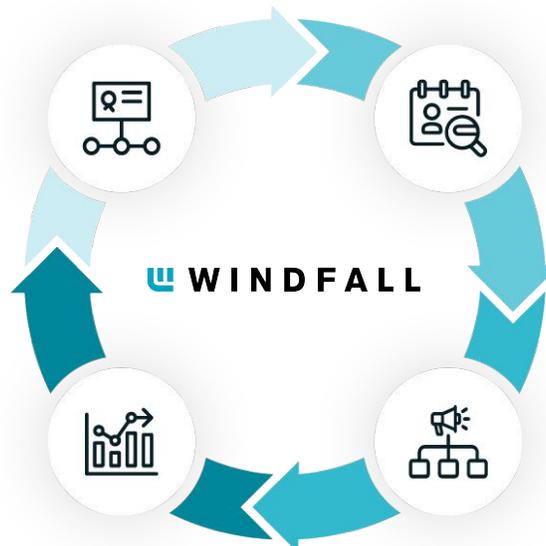
## Supercharge Insights and Campaign Performance

### Identify

Uncover and prioritize segments within first and third party data that are likely to engage and drive revenue.

### Measure

Understand the true ROI of campaigns with online and offline attribution that includes data measurement and matchback.



### Understand

Leverage meaningful, accurate insights to decode your audience, uncover hidden gems, and focus your outreach.

### Engage

Establish and cultivate lasting relationships at every touchpoint with the right message at the right time.

Windfall is a people intelligence and AI company that gives marketing, sales, and analytics teams actionable insights. By democratizing access to people data, organizations can intelligently prioritize go-to-market resources to drive greater business outcomes such as identifying high value targets, understanding customer personas, and increasing conversion rates to maximize ROI. Powered by best-in-class machine learning and propensity modeling, Windfall activates insights into workflows that engage the right people for each respective organization. More than 800 data-driven organizations use Windfall to power their business.