



# COLDWELL BANKER

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## WEALTH ENGINE Platform

Is a powerful tool, offered by Wealth Engine, that allows you to create and download targeted prospects lists from over 45 sources on more than 150 million US individuals in real-time to use in your marketing efforts.

### What functionalities does the WE platform include?

- Individual lookup – Discover someone’s wealth, behavior, and demographic profile instantly, including key real estate metrics such as the number of properties owned, real portfolio value, and more\*
- Identify individuals in a market by geography, wealth, business name, etc.
- Market research and prospect list creation – the Wealth Engine prospecting tool allows you to create lists across hundreds of data points

### Is Wealth Engine available to everyone?

- No, it is not available to everyone. It is only available to Luxury Property Specialists

### How do I get access to the Wealth Engine (WE) platform?

- You can access the WE agreement form by clicking [here](#)
- Once you sign the user agreement form and LPS status has been verified, an email will be sent to Wealth Engine
- Once Wealth Engine receives the signed form, be on the lookout for an email from WE or DocuSign with the subject line “Wealth Engine Platform Access” with a secondary form to sign
- Once both forms are filled out, you’ll receive a Welcome Email walking you through the account creation
- Please note the entire process can take 5-7 days to get access
- You will also receive a schedule of the demo/training sessions and the Q&A sessions with registration links

### What does the Wealth Engine license include?

- The WE license provides Luxury Property Specialists access to hundreds of wealth and lifestyle attributes from 45 sources or more and the ability to run the first 1,000 names for free

### Is there a cost if my list exceeds 1,000 names?

\*The data sources may only be used for lawful purposes, as further described in the Individual License Agreement you will sign

- Yes, there is a cost for lists of over 1,000 names

**What happens when I exceed my free 1,000 names?**

- You can purchase additional names. The minimum purchase is \$500.00 which equates to 2,500 names.

**Do I need to use my list of names all at once?**

- 1,000 credits are provisioned to each user and can be used in increments of 25 or more.

**Does the list of names have an expiration date?**

- When the agreement renews each July 1 between WealthEngine and Coldwell Banker, each user will receive 1,000 new credits. The credits are used to generate prospect lists.

**Who do I contact to purchase additional names?**

- Please contact [moira.boyle@altrata.com](mailto:moira.boyle@altrata.com)

**How much does it cost to get the Wealth Engine license?**

- As part of the benefits offered by the Coldwell Banker Global Luxury® program, CBGL has absorbed the Wealth Engine platform license cost and is able to offer Luxury Property Specialists access to the Wealth Engine platform free of charge

**Once I have my Wealth Engine license, do I need to renew it?**

- No, the Corporate level contract will renew the Wealth Engine license.

**What happens if I leave Coldwell Banker Real Estate, do I still have access to the Wealth Engine platform?**

- Once you leave Coldwell Banker, your WE license will be deactivated.

**Who do I contact for questions related to the Wealth Engine platform?**

- For WE access questions: [moira.boyle@altrata.com](mailto:moira.boyle@altrata.com)
- For WE support and password help: [darcy.fellona@altrata.com](mailto:darcy.fellona@altrata.com)

## Coldwell Banker - WealthEngine Walkthrough and Q&A Session

<https://attendee.gotowebinar.com/rt/1451146881625438553>

<b>Date</b>	<b>Time</b>	<b>Session</b>
Tuesday, Aug 20, 2024	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, September 10, 2024	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Sep 24, 2024	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Oct 8, 2024	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Oct 22, 2024	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Nov 5, 2024	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Nov 19, 2024	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Dec 3, 2024	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Dec 17, 2024	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Jan 7, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Jan 21, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Feb 4, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Feb 18, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Mar 11, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Mar 25, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Apr 8, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Apr 22, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, May 6, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, May 20, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Jun 10, 2025	9:00 am (EST) 30 minutes	Demo / Search & Prospect Training + Q&A
Tuesday, Jun 24, 2025	1:00 pm (EST) 30 minutes	Demo / Search & Prospect Training + Q&A

## WealthEngine Pre-Recorded Training Webinar – available any time

<https://attendee.gotowebinar.com/recording/4432231864330231386>

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