



COLDWELL BANKER

WEALTHENGINE Platform

WealthEngine is a powerful platform that enables you to create and download targeted prospect lists from over 45 data sources, covering more than 150 million U.S. individuals — all in real time.

What functionalities does the WealthEngine 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 WealthEngine prospecting tool allows you to create lists across hundreds of data points

Is WealthEngine available to everyone?

- No, it is only available to Luxury Property Specialists

How do I get access to the WealthEngine (WE) platform?

- You can access the agreement form by clicking [here](#)
- After signing the user agreement, you will receive a confirmation email from GLWM@anywhere.re.
 - If you do not receive the confirmation email, please first check your spam or junk folder
 - If the email still does not appear, try submitting the form again
 - Should the issue persist, please contact David.garlitzke@cbhome.com and include as much detail as possible (e.g., time and date of submission, any error messages, screenshots, etc.) so the issue can be properly reviewed and resolved.
- Once your Luxury Property Specialist (LPS) status has been verified, the form will be sent to an Altrata team member through DocuSign
- Once Altrata processes the DocuSign forms, you’ll receive a Welcome Email walking you through the account creation along with a copy of the user agreement
- 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 WealthEngine license include?

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

- The WealthEngine license grants Luxury Property Specialists access to hundreds of wealth and lifestyle attributes, with the ability to run up to 500 names at no cost.

Is there a cost if my list exceeds 500 names?

- Yes, there is a cost for lists of over 500 names

What happens when I exceed my free 500 names?

- You can purchase additional names by reaching out to moira.boyle@altrata.com

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

- 500 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 active user will receive 500 new credits. The credits are used to generate prospect lists.

How much does it cost to get the WealthEngine license?

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

Once I have my WealthEngine license, do I need to renew it?

- No, the Corporate level contract will renew the WealthEngine license.

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

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

Support Contacts:

- Access & General Questions: moira.boyle@altrata.com
- Technical Support & Password Help: jenny.huang@altrata.com

Coldwell Banker - WealthEngine Walkthrough and Q&A Session

<https://attendee.gotowebinar.com/rt/4803174113474363993>

All sessions are 30 minutes and include live Q&A

Date	Time	Session
Tuesday, Jan 27, 2026	1:00pm (EST)	Demo / Search & Prospect Training +Q&A
Tuesday Feb 10, 2026	9:00am (EST)	Demo / Search & Prospect Training +Q&A
Tuesday, Feb 24, 2026	1:00pm (EST)	Demo / Search & Prospect Training +Q&A
Tuesday March 10, 2026	9:00am (EST)	Demo / Search & Prospect Training +Q&A
Tuesday, March 24, 2026	1:00pm (EST)	Demo / Search & Prospect Training +Q&A
Tuesday April 7, 2026	9:00am (EST)	Demo / Search & Prospect Training +Q&A
Tuesday, April 21, 2026	1:00pm (EST)	Demo / Search & Prospect Training +Q&A
Tuesday May 5, 2026	9:00am (EST)	Demo / Search & Prospect Training +Q&A
Tuesday, May 19, 2026	1:00pm (EST)	Demo / Search & Prospect Training +Q&A

WealthEngine Pre-Recorded Training Webinar – available any time

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

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