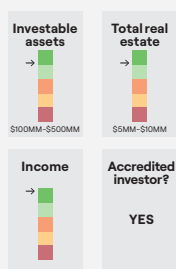


Qualify and Learn More About Your Potential Buyers with WealthEngine

Need to learn more about prospects who attended your open house? Do they have the wealth and income to afford the property? Use WealthEngine (WE) search to find out. WE profiles will give you a summary of their wealth, including estimated net worth, investable assets, total real estate value, income and more. Additionally, you will be able to find detailed information about their assets, lifestyle and interests, which can help you learn more about them and better prepare for a strategic approach.

Here is a sample of a WE profile:



- Dick, 53, and Jane, 49, have two children.
- They live in a single-family home in Palo Alto, CA.
- Dick is an Executive Vice President for a large information technology company.
- Jane is an architect and board member of a women's health nonprofit.
- They support the Democratic Party candidates and contribute to charities such as the local art museum and area hospital.
- As boat owners, they enjoy their recreational time.

Support for Coldwell Banker® Agents

The WealthEngine Platform is available as a complimentary offering for Coldwell Banker Certified **Luxury Property Specialists** only. To obtain access, navigate to **MYCBDESK** and search for the "Wealth Engine" section on the Global Luxury - Marketing Tools page to learn more. To complete setup of the complimentary subscription, two forms will be required: the first form is the Wealth Engine Agreement Form located within the WealthEngine FAQ, and the second form will be sent via DocuSign by an Altrata team member. Please allow 5-7 business days for access to be granted.

Want to Learn More?

Join a Coldwell Banker + WealthEngine Demo & Q&A Session
Find the full schedule in the WealthEngine FAQ on CB Desk.

Have questions?

Contact **Jenny Huang**, jenny.huang@altrata.com or **Moir Boyle**, moira.boyle@altrata.com

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altrata.com/products/wealthengine

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