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Echelon Power Segments™
Implementation Suggestions

Echelon Power Segments are a demographic score based on measurement of actual liquid financial assets such as stocks, bonds, bank deposits, mutual funds and annuity assets. IXI Corporation developed Echelon Power Segments exclusively for Target Analytics by using IXI's cooperative database of financial assets from over 95 leading financial companies, comprising over $10 trillion in liquid assets. The score adheres to consumer privacy standards by being aggregated at the ZIP+4 (average of 7-10 households) level, yet still allows for 'micro neighborhood' analysis.

In addition to providing liquid financial asset indicators, the results also include demographic indicators such as average income, average age, percentage of households with children under the age of 18 and percentage of retired individuals by segment.

For your records to be scored a valid residential street address is needed with Zip+4 (no P.O. Boxes, etc.), as well as a birth date. If no birth date is provided, Blackbaud will attempt to determine a birth date to use.

Echelon Power Segments are especially helpful in uncovering prospects that generally remain "hidden" during a traditional wealth screening. Some examples include: retired wealthy individuals, inherited wealth, privately-held wealth, women, and industries not readily available through traditional wealth screenings.

Development Offices have been using Echelon Power Segments effectively in their major giving, annual giving, and planned giving programs. They have also utilized the results to target lists for events, peer screening, and other special projects.

Here are some examples of how you can use Echelon Power Segments at your institution:

○ **Major Gifts:** target high capacity individuals that were not rated highly by wealth screening, or have not yet been identified by your staff:
- Generally, we consider Segments 1-4 to be your top segments. These segments include the potentially wealthiest members of society and we find that most organizations receive the majority of their donations from this group.
- Some organizations looking for a broader base find it more strategic to start with Segments 1-7.
- **Use traditional prospect research techniques to fill in the picture**

○ **Annual Giving:** segment appeals/ask amount more strategically by using **Echelon Power Segments** to:
- Determine higher ask amounts
- Create different messaging

○ **Planned Giving:** utilize the older and mid-career segments, combined with past giving, age and other factors, to develop targeted lists for your Planned Giving Programs

Echelon Power Segments™
18 Tier Prospect Classification System

Echelon Power Segment	Average Investable Assets*	2010 % of U.S. HH's in Segment
AGE GROUP: OLDER		
1	$2,020,315	0.39%
3	$528,861	0.90%
5	$304,585	2.53%
9	$108,537	4.43%
11	$35,929	6.11%
16	$5,165	8.50%
AGE GROUP: MID-CAREER		
2	$985,831	0.64%
4	$857,634	2.12%
6	$273,752	6.84%
8	$172,252	2.85%
10	$90,807	6.58%
12	$19,282	13.84%
14	$15,634	15.05%
15	$9,961	4.34%
AGE GROUP: YOUNGER		
7	$1,043,468	0.26%
13	$60,670	11.65%
17	$4,118	8.90%
18	$15,824	4.08%
U.S. Total		100%

* Multi-sourced IXI research

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- **Special Programming:**
  - Consider Segment 7 for young leadership roles within your organization
  - Decide who to invite to high end events
  - Plan gift officer trips around results

The following pages provide specific classification details on each of the Echelon Power Segments™ including other demographic indicators.

ECHELON POWER SEGMENTS TIER DESCRIPTIONS

Echelon Tier 1 Age group: Older
Avg household financial assets: $2,020,315
Avg household income: $303,677
Avg head of household age: 69
Households with children under 18: 4.6%
Retired head of household: 54%

Echelon Tier 2 Age group: Mid-Career
Avg household financial assets: $985,831
Avg household income: $246,200
Avg head of household age: 58
Households with children under 18: 21.6%
Retired head of household: 19%

Echelon Tier 3 Age group: Older
Avg household financial assets: $528,861
Avg household income: $137,020
Avg head of household age: 72
Households with children under 18: 3.7%
Retired head of household: 71%

Echelon Tier 4 Age group: Mid-Career
Avg household financial assets: $857,634
Avg household income: $240,994
Avg head of household age: 47
Households with children under 18: 64.6%
Retired of household: 2%

Echelon Tier 5 Age group: Older
Avg household financial assets: $304,585
Avg household income: $102,898
Avg head of household age: 75
Households with children under 18: 2.6%
Retired head of household: 80%

Echelon Tier 6 Age group: Mid-Career
Avg household financial assets: $273,752
Avg household income: $146,589
Avg head of household age: 57
Households with children under 18: 21.9%
Retired head of household: 17%

Echelon Tier 7 Age group: Younger
Avg household financial assets: $1,043,468
Avg household income: $199,022
Avg head of household age: 30
Households with children under 18: 41.6%
Retired head of household: 0%

Echelon Tier 8 Age group: Mid-Career
Avg household financial assets: $172,252
Avg household income: $124,223
Avg head of household age: 54
Households with children under 18: 32.8%
Retired head of household: 14%

Echelon Tier 9 Age group: Older
Avg household financial assets: $108,537
Avg household income: $73,418
Avg head of household age: 74
Households with children under 18: 2.4%
Retired head of household: 81%

Echelon Tier 10 Age group: Mid-Career
Avg household financial assets: $90,807
Avg household income: $107,386
Avg head of household age: 47
Households with children under 18: 54%
Retired head of household: 2%

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Echelon Tier 11 Age group: Older
Avg household financial assets: $35,929
Avg household income: $53,117
Avg head of household age: 77
Households with children under 18: 4.2%
Retired head of household: 84%

Echelon Tier 12 Age group: Mid-Career
Avg household financial assets: $19,282
Avg household income: $63,049
Avg head of household age: 59
Households with children under 18: 13.2%
Retired head of household: 22%

Echelon Tier 13 Age group: Younger
Avg household financial assets: $60,670
Avg household income: $88,222
Avg head of household age: 30
Households with children under 18: 53.8%
Retired head of household: 0%

Echelon Tier 14 Age group: Mid-Career
Avg household financial assets: $15,634
Avg household income: $67,705
Avg head of household age: 40
Households with children under 18: 67.4%
Retired head of household: 0%

Echelon Tier 15 Age group: Mid-Career
Avg household financial assets: $9,961
Avg household income: $61,524
Avg head of household age: 49
Households with children under 18: 36.2%
Retired head of household: 3%

Echelon Tier 16 Age group: Older
Avg household financial assets: $5,165
Avg household income: $37,990
Avg head of household age: 75
Households with children under 18: 4.1%
Retired head of household: 80%

Echelon Tier 17 Age group: Younger
Avg household financial assets: $4,118
Avg household income: $51,571
Avg head of household age: 30
Households with children under 18: 63.1%
Retired head of household: 0%

Echelon Tier 18 Age group: Younger
Avg household financial assets: 15,824
Avg household income: $50,237
Avg head of household age: 22
Households with children under 18: 33.6%
Retired head of household: 0%

Echelon Tier 19: Invalid Age

Echelon Tier 20 or Blank: Invalid Address
(e.g. non-residential address or address
that could not be standardized for scoring
purposes)

Contact your Target Analytics account representative to learn more about wealth
screening, or contact us at solutions@blackbaud.com.