Wealth Window™
An ALC Smart Data Solution

Predictive Insights

Personality Data that Predicts Purchasing Behavior

ALC's Wealth Window database, the leading resource for reaching the wealthiest individuals in the U.S., presents a new aspect of consumer intelligence that identifies attitudes, personalities, and preferences. These are the characteristics at the root of all wants and needs that drive the purchasing behavior among affluent consumers.

Wealth Window Predictive Insights gives marketers deeper insights into what compels individuals to act, buy, subscribe, join, donate, vote, or simply express an interest to learn more.

Make Your Marketing Personal

Working in cooperation with innovative data pioneers, including FMCG and PYCO, Predictive Insights delivers actionable intelligence that allows marketers to better understand customer preferences and "speak" to the differences among affluent consumers with messaging and graphics that will get their attention and stimulate them to take action.

Wealth Window Predictive Insights draws on this new data to create more customized target audiences by matching personality and preference attributes for the following core wealth markets:

- **Financial Services**
- **First-Class Travel**
- **Luxury Merchandise**
- **Philanthropy**
- **Premium Real Estate**

Armed with Wealth Window Predictive Insights, marketers can enhance their selection and segmentation criteria to boost the performance of their multichannel campaigns.

Your Key to Future Customer and Prospect Actions

Consider two Wealth Window individuals – they are both corporate executives, own vacation homes, and belong to exclusive country clubs. However, one is conservative and practical and makes decisions only after conducting thorough research, while the other is adventurous and spontaneous and acts quickly based on intuition. Clearly, "one size fits all" promotion does not take these attributes into account.

Wealth Window Predictive Insights allows you to tailor your marketing approach to key differences in personality and:

- **Craft the right language that will resonate with your target wealth segment.**
- **Target the individuals who will respond best to the style and visual appeal of your offer.**
- **Deliver your messages at crucial times during the decision-making processes.**
- **Utilize media most likely to appeal to specific audiences.**

Your Portal to America's 1%

For More Information or to Schedule a Consultation, Please Contact:
Emily Briody, Vice President, Wealth Window
Phone 609-580-2971 • Email emily.briody@alc.com
www.alcwealthwindow.com

ALC
MAKE IT PERSONAL®

Wealth Window™
An ALC Smart Data Solution

Predictive Insights: Financial Market

The Predictive Power of Personality & Buying Preferences

Supplementing Wealth Window's already robust data resources with new financial preference information allows financial marketers to understand and engage with customers and prospects like never before.

Working hand-in-hand with First Manhattan Consulting Group (FMCG), a leading financial market research firm, ALC has developed specific financial "personas" based on deep understanding of the emotional and attitudinal drivers of financial decisions.

Predictive Insights: Financial Market Personas

Individuals on the Wealth Window database index among the highest in the nation for investable assets, bank deposits, and credit scores. Now you can identify the prospects among them who will be most receptive to your specific financial offers.

> With Predictive Insights: Financial Market personas you can craft messaging that corresponds to financial identities and their personality types. Or segment personas within the vast Wealth Window information storehouse to identify those consumers who will best respond to your product and current promotional style.

Our Wealth Window Financial Personas are crafted to define targeted audiences for key financial products and services:

Liquid Deposits – *checking, savings, money market and CD accounts:*
- Local Branch Banker
- Self-Directed Interest Rate Shopper
- Financial Advisor-Reliant Saver

Personal Investments & Wealth Management – *growth and protection services:*
- Aggressive Self-Directed Trader
- Conservative Fund Investor
- Advisor-Reliant Investor
- Savvy Information-Driven Investor

Insurance – *life and property insurance:*
- Unsure Advice Seeker
- Agent-Reliant Loyalist
- Self-Directed Planner

Mortgages – *mortgage and refinance loans:*
- Rate-Watching Perennial Refinancer
- Dormant High-Likelihood Refinancer

Home Equity Loans – *vehicles using home value as collateral:*
- Major Expense Financer
- Continual Line of Credit Borrower

Credit Cards – *credit card preferences:*
- Rate-Shopping Revolver
- Rewards Card Loyalist

Your Portal to America's 1%

ALC
MAKE IT PERSONAL®

Wealth Window™
An ALC Smart Data Solution

Predictive Insights: Affluent Personas

The Power of Personality

Predictive Insights incorporates information developed in cooperation with PYCO, a personality research firm that applies psychological traits to individuals. Personality is the root of all behaviors, feelings, attitudes, desires, and needs. Marketers can use Wealth Window Predictive Insights to engage, connect, communicate, sell, and build relationships with the different types of Wealth Window consumers.PYCO personality data lets marketers become significantly more persuasive, which means better results and higher response.

Here's the proof: Marketers who incorporate PYCO data into campaigns see:
- **12x Increase in web traffic** – for an online retailer
- **4x Increase in direct response** – for a luxury resort
- **18% Lift in donations** – for a nonprofit agency

Match Personality Types of your Best Customers & Prospects

Wealth Window PerfectMatch™ modeling creates highly targeted universes for individual marketers. ALC will analyze a segment of your customer file to determine the various types of personalities they exhibit. We then index levels of predictive performance based on a range of personality traits assigned to the individuals.

The best performing personality types are matched to Wealth Window to deliver affluent prospects that will be most responsive to your various products and creative approaches. Model results can also be applied to house or other third party prospect files for additional lift.

Make it Personal with Personality Categories

Among each category are many other personality indicators, including extrovert, introvert, judger, perceiver, thinker, and feeler. These aspects further define the personality types.

Rational Thinkers
- Logical
- Assertive
- Decisive
- Reserved
- Objective
- Pragmatic

Artisan Perceivers
- Adventurous
- Sociable
- Spontaneous
- Curious
- Enthusiastic
- Sensitive

Responsible Guardians
- Practical
- Considerate
- Steadfast
- Kind
- Organized
- Protective

Idealist Cooperators
- Expressive
- Impulsive
- Loyal
- Committed
- Perceptive
- Caring

PYCO personality data provides insight into how consumers process information, choose products, and make decisions on purchasing or donating. Let us expertly guide you through the process of employing Predictive Insights data into your marketing strategies.

Your Portal to America's 1%

For More Information or to Schedule a Consultation, Please Contact:
Emily Briody, Vice President, Wealth Window
Phone 609-580-2971 • Email emily.briody@alc.com
www.alcwealthwindow.com

ALC
MAKE IT PERSONAL®