



THE WEALTH INTELLIGENCE DATABASE™ 2008

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Preliminary Match Report

Prepared for Example
September 2008



DATA SUMMARY

Records supplied	8,754
Records on our database with an individual match to a record supplied	77
Records on our database with a household (family) match to one or more records supplied*	101
Total records on our database with a match to records supplied	178

* A single record on our database that matches multiple family members on records supplied is counted as a single household match in the figures below.

SECTION ONE: INDIVIDUAL MATCHES

1. National Overview

A count of individual matches by wealthband

Tree	Constituent Records
National Overview	77
---A £50m+	1
---C £10m - £25m	4
---D £5m - £10m	8
---E £1m - £5m	60
---F Influential	4

2. Regional Overview

A count by UK Region (based on postcode) and wealthband

Tree	Constituent Records
Regional Overview	77
---Central London	1
--- ---E £1m - £5m	1
---East Anglia	55
--- ---A £50m+	1
--- ---C £10m - £25m	3
--- ---D £5m - £10m	6
--- ---E £1m - £5m	42
--- ---F Influential	3
---East Midlands	1
--- ---E £1m - £5m	1



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Tree	Constituent Records
---Greater London (Excl C London)	2
--- ---C £10m - £25m	1
--- ---E £1m - £5m	1
---North West	1
--- ---F Influential	1
---Northern Regions	1
--- ---D £5m - £10m	1
---South East	16
--- ---D £5m - £10m	1
--- ---E £1m - £5m	15



3. Age Profile

Age Band and wealthband

Tree	Constituent Records
Age Profile	77
---Unc.	14
--- ---E £1m - £5m	13
--- ---F Influential	1
---C 36 - 45	3
--- ---D £5m - £10m	1
--- ---E £1m - £5m	2
---D 46 - 55	12
--- ---C £10m - £25m	1
--- ---D £5m - £10m	1
--- ---E £1m - £5m	10
---E 56 - 65	23
--- ---A £50m+	1
--- ---D £5m - £10m	4
--- ---E £1m - £5m	17
--- ---F Influential	1
---F 66+	25
--- ---C £10m - £25m	3
--- ---D £5m - £10m	2
--- ---E £1m - £5m	18
--- ---F Influential	2



4. Constituent Attributes

Count by wealthband of main constituent attributes in the database. Note that one individual may have more than one attribute applied to their record in the data. The attribute "Profile Possible" denotes those individuals where a full in depth profile is available if required.

Tree	Constituent Records
Constituent Attributes	72
---A £50m+	1
--- ---Company Director	1
--- ---Shareholder (with supporting investment data)	1
--- ---Profile Possible	1
---C £10m - £25m	4
--- ---Company Director	4
--- ---Shareholder (with supporting investment data)	3
--- ---Profile Possible	4
---D £5m - £10m	8
--- ---Charity Trustee	1
--- ---Company Director	6
--- ---Influential Directory	3
--- ---Livery Co Member	2
--- ---Shareholder (with supporting investment data)	3
--- ---Profile Possible	8
---E £1m - £5m	55
--- ---Charity Trustee	2
--- ---Company Director	30
--- ---Donor	3
--- ---Grant Making Trustee	1
--- ---Influential Directory	10
--- ---Livery Co Member	2
--- ---National Gardens Scheme	1
--- ---Shareholder (with supporting investment data)	32
--- ---Profile Possible	37
---F Influential	4
--- ---Charity Trustee	1
--- ---Company Director	1
--- ---Donor	4
--- ---Grant Making Trustee	1
--- ---Influential Directory	1
--- ---National Gardens Scheme	3
--- ---Profile Possible	2



5. Wealthy Investors

Count by wealthband of those individuals with known high value investment portfolios.
Investment data supplied courtesy of Matrix-Data Limited.

Tree	Constituent Records
Wealthy Investors	77
---A £50m+	1
--- ---C £250,000 - £1m	1
---C £10m - £25m	4
--- ---Unclassified	1
--- ---A £2m and over	2
--- ---B £1m - £2m	1
---D £5m - £10m	8
--- ---Unclassified	6
--- ---A £2m and over	1
--- ---C £250,000 - £1m	1
---E £1m - £5m	60
--- ---Unclassified	58
--- ---C £250,000 - £1m	2
---F Influential	4
--- ---Unclassified	4



SECTION TWO: HOUSEHOLD (Family Level) MATCHES

6. National Overview

A count of household matches by wealthband

Tree	Constituent Records
National Overview	101
---B £25m - £50m	1
---C £10m - £25m	4
---D £5m - £10m	12
---E £1m - £5m	81
---F Influential	3

7. Regional Overview

A count by UK Region (based on postcode) and wealthband

Tree	Constituent Records
Regional Overview	101
---Central London	4
--- ---D £5m - £10m	1
--- ---E £1m - £5m	3
---East Anglia	77
--- ---B £25m - £50m	1
--- ---C £10m - £25m	2
--- ---D £5m - £10m	8
--- ---E £1m - £5m	64
--- ---F Influential	2
---East Midlands	1
--- ---C £10m - £25m	1
---North West	1
--- ---E £1m - £5m	1
---South East	18
--- ---C £10m - £25m	1
--- ---D £5m - £10m	3
--- ---E £1m - £5m	13
--- ---F Influential	1



8. Age Profile

Age Band and wealthband

Tree	Constituent Records
Age Profile	101
---Unc.	38
--- ---B £25m - £50m	1
--- ---C £10m - £25m	1
--- ---D £5m - £10m	1
--- ---E £1m - £5m	32
--- ---F Influential	3
---C 36 - 45	5
--- ---D £5m - £10m	1
--- ---E £1m - £5m	4
---D 46 - 55	10
--- ---C £10m - £25m	1
--- ---D £5m - £10m	1
--- ---E £1m - £5m	8
---E 56 - 65	26
--- ---D £5m - £10m	2
--- ---E £1m - £5m	24
---F 66+	22
--- ---C £10m - £25m	2
--- ---D £5m - £10m	7
--- ---E £1m - £5m	13



9. Constituent Attributes

Count by wealthband of main constituent attributes in the database. Note that one individual may have more than one attribute applied to their record in the data. The attribute "Profile Possible" denotes those individuals where a full in depth profile is available if required.

Tree	Constituent Records
Constituent Attributes	87
---B £25m - £50m	1
--- ---Profile Possible	1
---C £10m - £25m	4
--- ---Charity Trustee	1
--- ---Company Director	3
--- ---Grant Making Trustee	1
--- ---Influential Directory	1
--- ---Shareholder (with supporting investment data)	3
--- ---Profile Possible	4
---D £5m - £10m	12
--- ---Charity Trustee	7
--- ---Company Director	5
--- ---Donor	3
--- ---Grant Making Trustee	1
--- ---Influential Directory	5
--- ---National Gardens Scheme	1
--- ---Shareholder (with supporting investment data)	9
--- ---Profile Possible	12
---E £1m - £5m	68
--- ---Charity Trustee	6
--- ---Company Director	25
--- ---Donor	8
--- ---Grant Making Trustee	2
--- ---Influential Directory	9
--- ---Livery Co Member	2
--- ---National Gardens Scheme	6
--- ---Shareholder (with supporting investment data)	40
--- ---Profile Possible	35
---F Influential	2
--- ---Shareholder (with supporting investment data)	1
--- ---Profile Possible	1



10. Wealthy Investors

Count by wealthband of those individuals with known high value investment portfolios.
Investment data supplied courtesy of Matrix-Data Limited.

Tree	Constituent Records
Wealthy Investors	101
---B £25m - £50m	1
--- ---Unclassified	1
---C £10m - £25m	4
--- ---Unclassified	2
--- ---A £2m and over	2
---D £5m - £10m	12
--- ---Unclassified	8
--- ---A £2m and over	2
--- ---C £250,000 - £1m	2
---E £1m - £5m	81
--- ---Unclassified	80
--- ---C £250,000 - £1m	1
---F Influential	3
--- ---Unclassified	2
--- ---B £1m - £2m	1