

Fueling Momentum Through Kindsight's Innovation





Ross Beattie
CEO & CHAIRMAN



Shaping the Landscape of Fundraising



Our Journey

1991

It started with a vision

2022

iWave cemented as market leader

2023

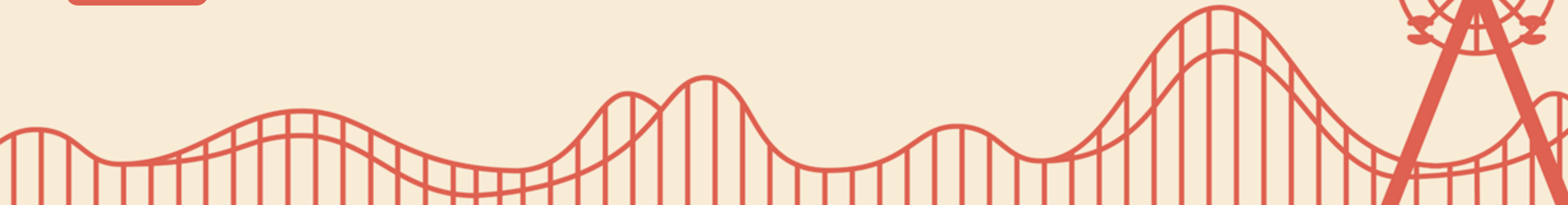
UCI and NOS joined our company

2024

Kindsight was established

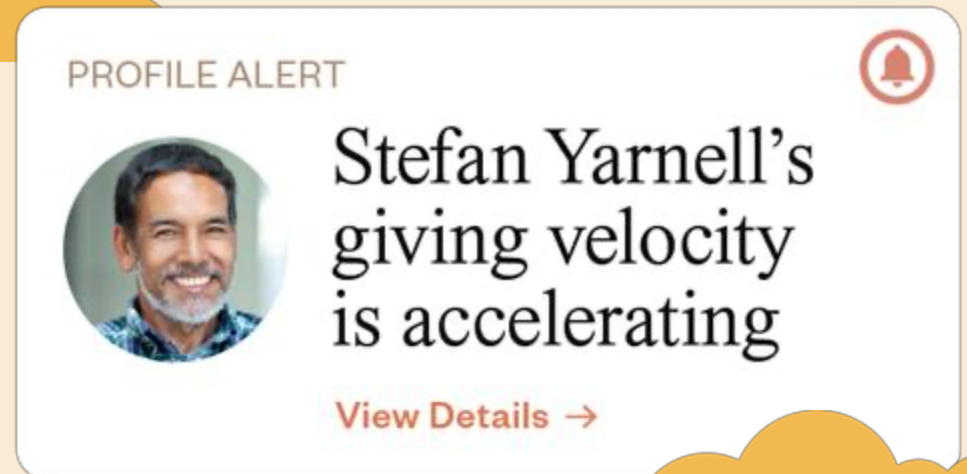
2025

We welcomed Affinaquest to the family



The Kindsight Vision

Have the *right* conversation,
with the *right* donor,
at the *right* time—every time.



That Vision is Unstoppable...

4K+

organizations
supported

90+

partners

5+

years as a top-rated
solution

used by

9/10

top US universities

1.5B+

wealth and
philanthropic records

\$1B+

raised for our client
organizations

...and so is our Community!

hoag Hospital
Foundation

AltaMed
Your community health network

ASU Arizona State
University

BARNARD

Beth Israel Lahey Health

Carleton

CHAPMAN UNIVERSITY

Cleveland Clinic

COLBURN
SCHOOL

Hamilton

SSMHealth

Creighton
UNIVERSITY

Pomona
College

LMU

University of Colorado Boulder

KU ENDOWMENT
The University of Kansas

EMBRY-RIDDLE
AERONAUTICAL UNIVERSITY

GEORGE MASON
UNIVERSITY

MOUNT HOLYOKE

MICHIGAN STATE
UNIVERSITY

THE UNIVERSITY OF TEXAS
MD Anderson
Cancer Center
Making Cancer History™

IOWA STATE UNIVERSITY
FOUNDATION

STATE ALUMNI
ASSOCIATION

Venice Family Clinic

NC STATE UNIVERSITY

NDSU FOUNDATION

Northwestern

Oregon Health
& Science University
FOUNDATION

THE UNIVERSITY OF OKLAHOMA
FOUNDATION

PITTSBURGH
CULTURAL
TRUST

Triangle
Education Foundation

PURDUE FOR LIFE
FOUNDATION

RIT

Segerstrom
Center for the Arts®

SVCF
SILICON VALLEY
COMMUNITY
FOUNDATION

AF UNITED STATES
AIR FORCE
ACADEMY

Stony Brook Foundation

UC San Diego

TEXAS TECH FOUNDATION

THE UNIVERSITY OF
SOUTHERN MISSISSIPPI

UNIVERSITY OF
ARKANSAS

Berkeley
UNIVERSITY OF CALIFORNIA

UCI University of
California, Irvine

UC RIVERSIDE

Cornell University

UND ALUMNI ASSOCIATION
FOUNDATION
LEADERS IN ACTION

THE UNIVERSITY OF
CHICAGO

University of Colorado
Anschutz Medical Campus

UF UNIVERSITY OF FLORIDA
FOUNDATION

IOWA
Center for Advancement

THE UNIVERSITY OF OKLAHOMA
FOUNDATION

THE UNIVERSITY OF
MISSISSIPPI
FOUNDATION

UNIVERSITY of
ROCHESTER

UNIVERSITY OF
SAN FRANCISCO

THE UNIVERSITY OF TENNESSEE
UT FOUNDATION

THE UNIVERSITY OF TOLEDO
FOUNDATION

WashU

Wesleyan University

UC
SANTA CRUZ

UCSF
University of California
San Francisco

UNI
FOUNDATION

EMORY
UNIVERSITY

ECU

THE
UNIVERSITY
OF UTAH

VANDERBILT
UNIVERSITY

KANSAS STATE UNIVERSITY
FOUNDATION

VOTE
RUN
LEAD

WISCONSIN
ALUMNI
ASSOCIATION

The Association
OF FORMER STUDENTS®
TEXAS A&M UNIVERSITY®

PALMER
College of Chiropractic
The Trusted Leader in
Chiropractic Education®

INSEAD
The Business School
for the World®

Georgia State
University

St. Jude Children's
Research Hospital
Finding cures. Saving children.

ACADEMY
MUSEUM

UNIVERSITY OF
PITTSBURGH

WESTERN GOVERNORS UNIVERSITY
wgu.edu

CLEMSON UNIVERSITY
1889

UNIVERSITY OF MISSISSIPPI
1848

SMU

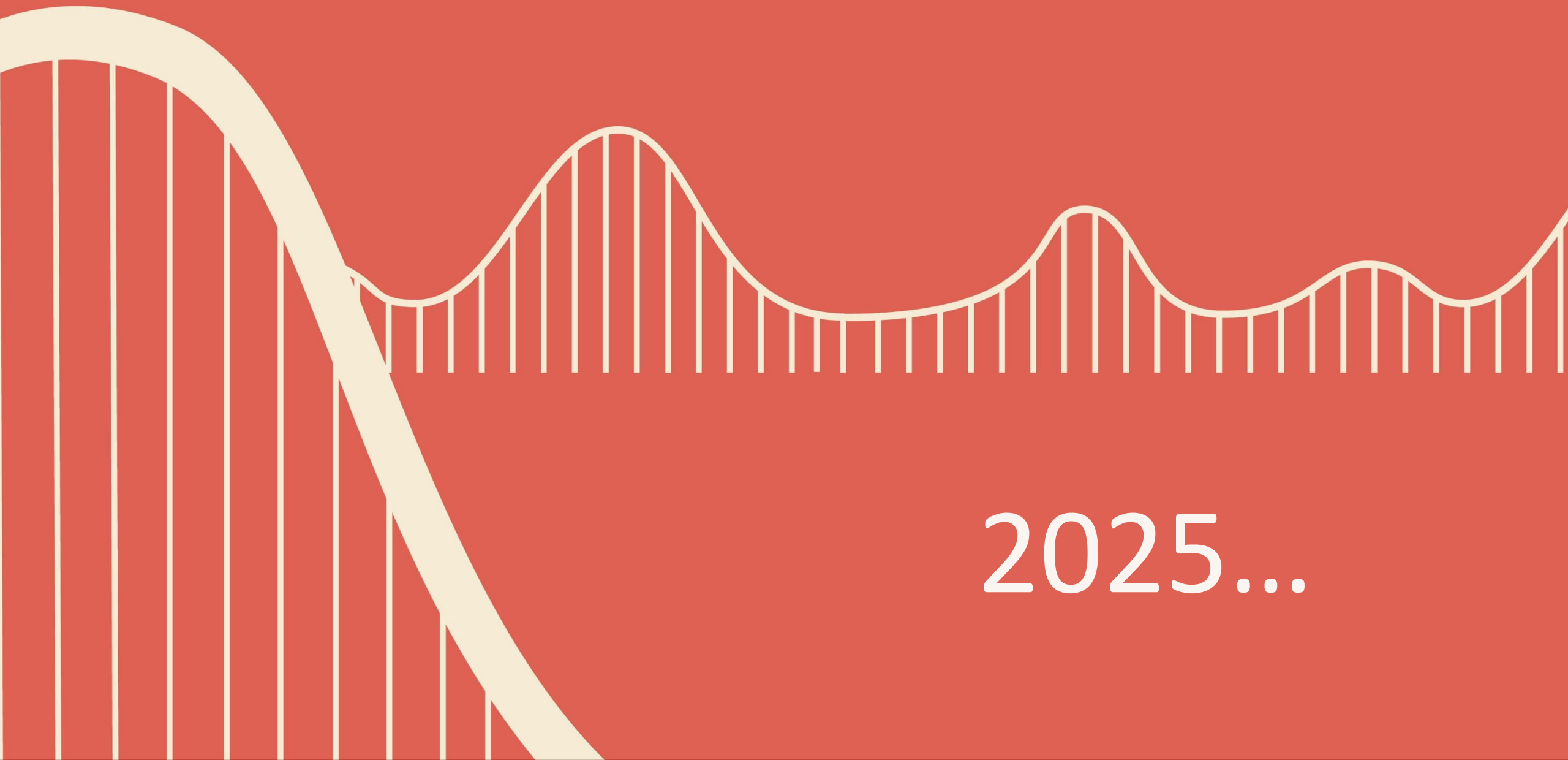
ST. GEORGE'S
SCHOOL



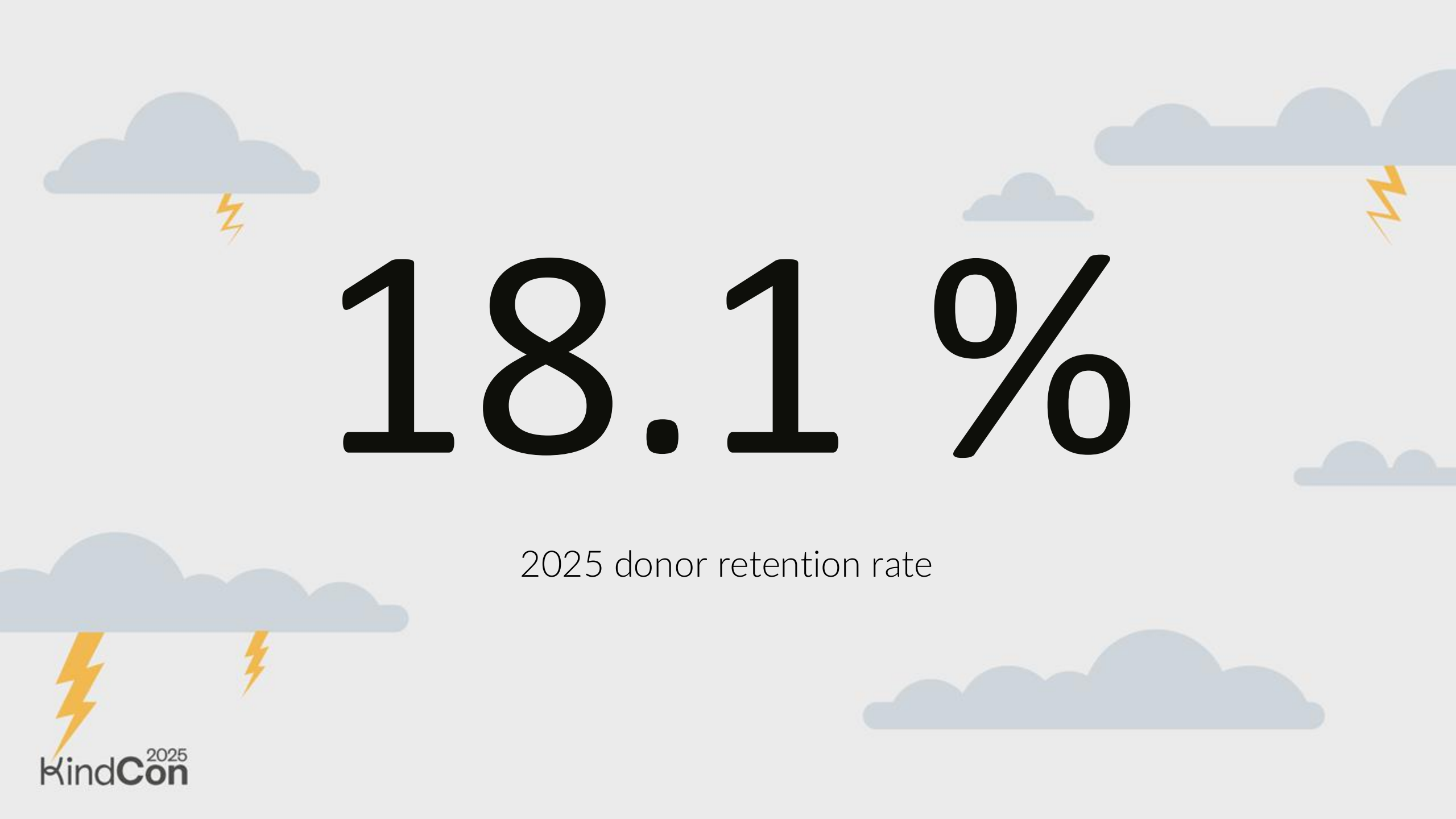
You want to do good for your
community.



But it keeps getting harder.



2025...



18.1%

2025 donor retention rate



11%

Decrease in first gifts in 2025



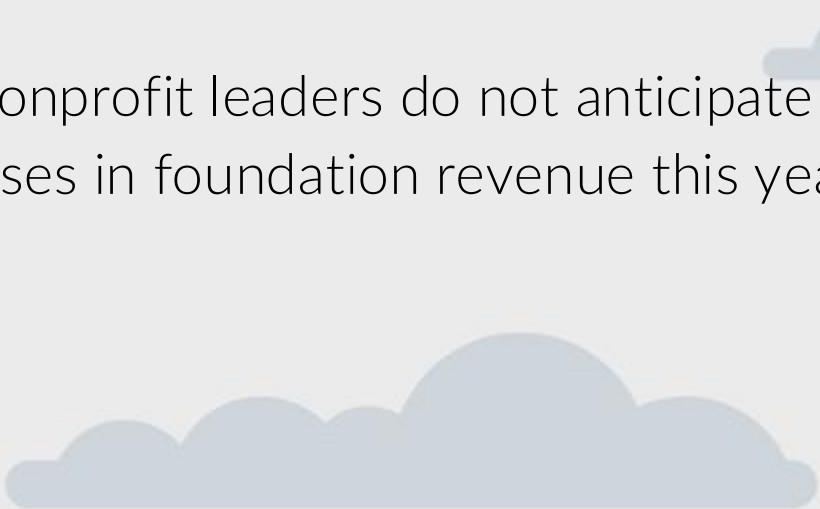
61 %

of nonprofit leaders do not anticipate
increases in individual giving this year



70 %

of nonprofit leaders do not anticipate
increases in foundation revenue this year





22,000+

Fundraising jobs lost in the first half of 2025

The background features a stylized illustration of a roller coaster track with several peaks and valleys. The track is represented by a series of vertical lines. Above the track, there are several grey, puffy clouds. Some of these clouds have yellow lightning bolts striking down. Diagonal dashed lines represent rain falling from the clouds. The overall color palette is muted, consisting of greys, blues, and yellows.

These aren't the only challenges
you are facing.

Manual Processes Are Causing Friction



Fundraising organizations

Stale Records

Poor Targeting

No Personalization

Fragmented
Workflows

Disconnected
Systems



Donors

When Data Fails,
So Does Your Mission.

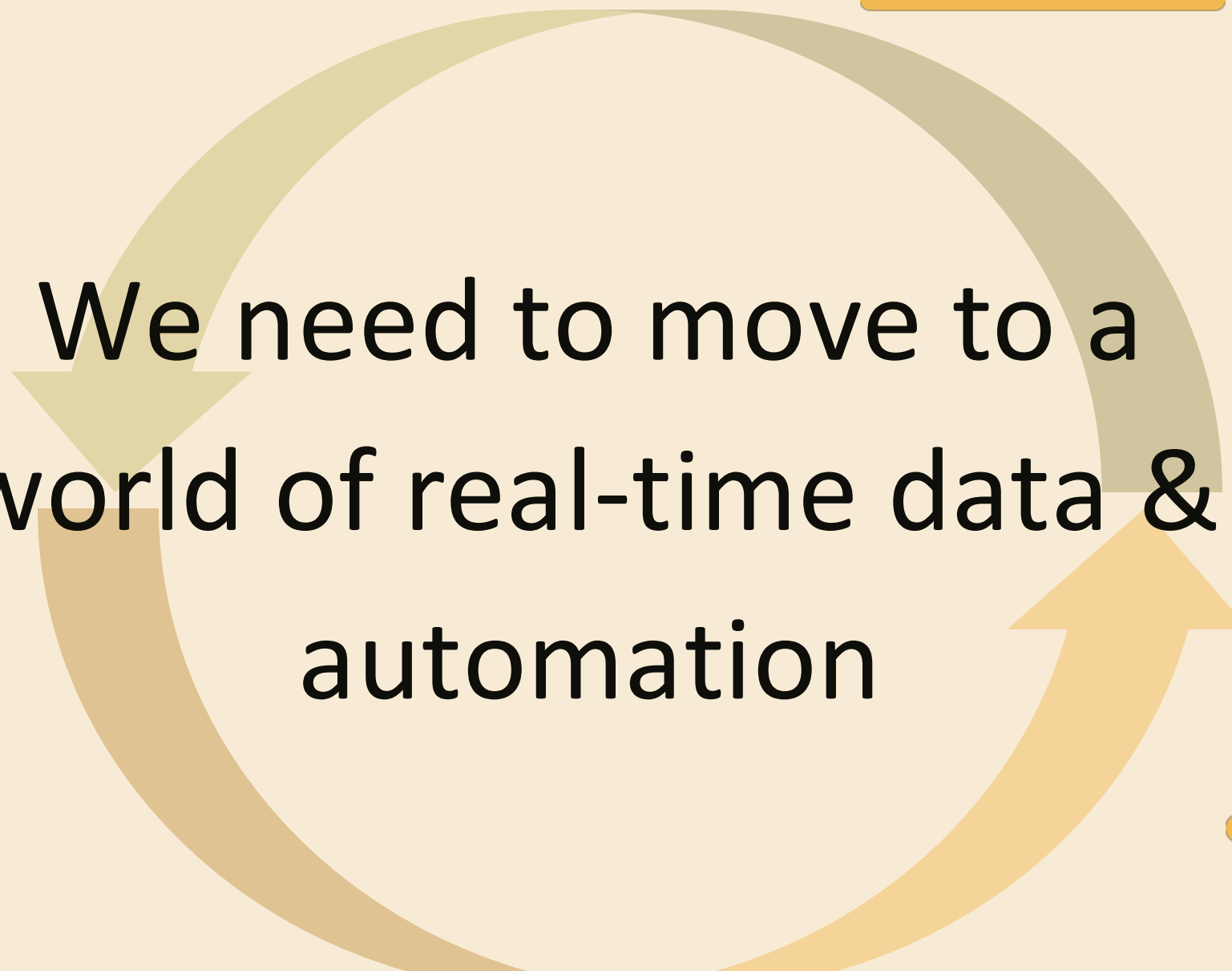


Rising tides float all boats.



When the tides are out, not all boats can float.





We need to move to a
world of real-time data &
automation

We'll be your tide





Hemant Kashyap

CHIEF PRODUCT OFFICER



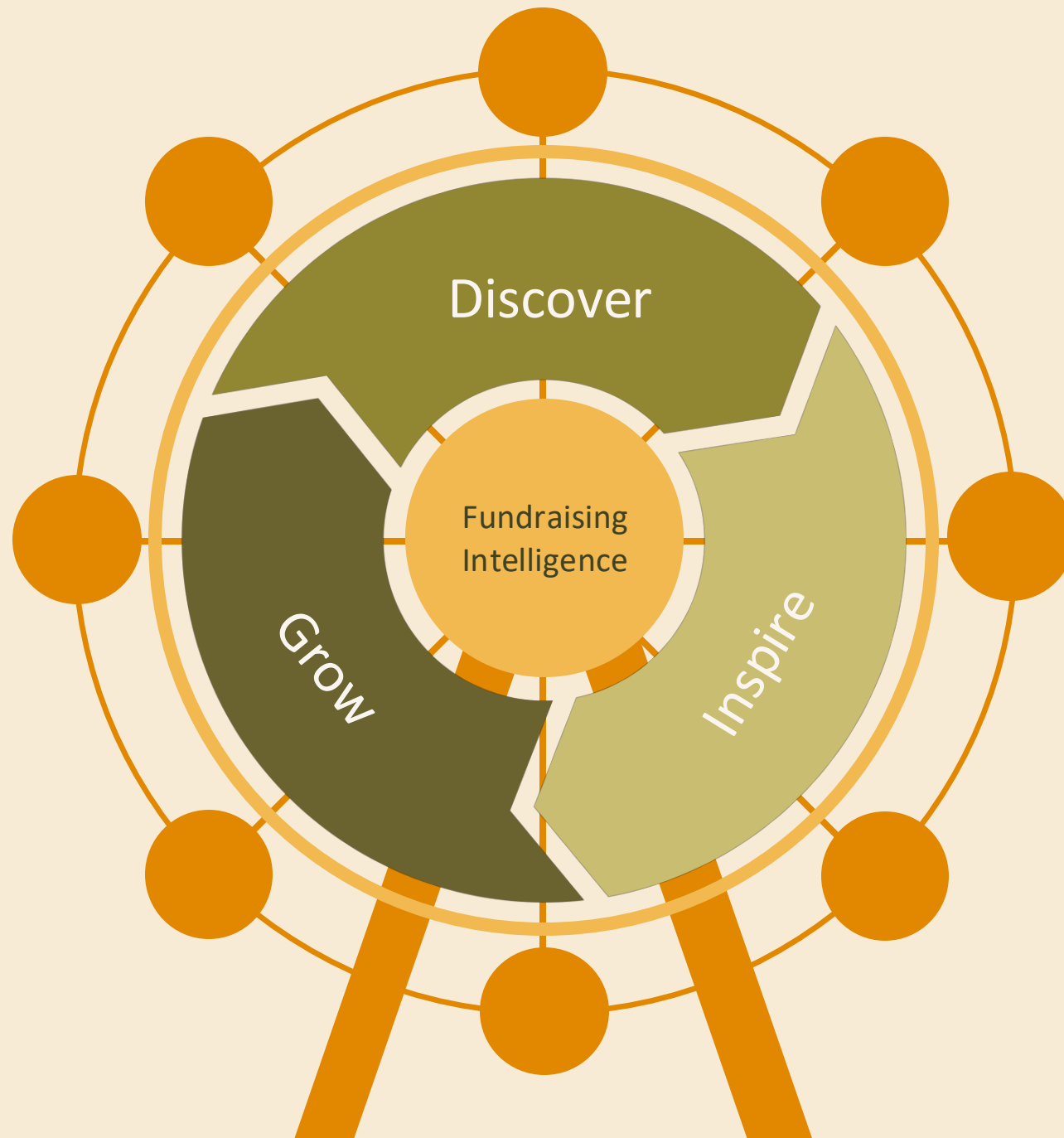
Fundraising Intelligence

is about taking clean, trustworthy data, and turning it into meaningful insights you can take action on.





Momentum is
everything.



Unlocking Momentum With Kindsight

The best way to turn friction into fundraising momentum, year after year.



Discover

Find the Right Donors



Inspire

Connect in a Personal Way



Grow

Steward Giving Year after Year



Discover



Inspire



Grow



iWave



Connect



AdvancementRM



Ascend



You asked, we listened



Discover



Inspire



Grow



iWave



Connect



AdvancementRM



Ascend



Laura Curk (LC)

DIRECTOR OF PRODUCT MARKETING



iWave

Institutions by Capacity		
INSTITUTION	KINDSIGHT SCORE	EST. CAPACITY
Li Healthcare Foundation	4	\$5,500,000
OnGuard Group	3	\$1,100,000
Solstice Partners	3	\$1,000,000
	2	\$1,000,000
	1	\$975,000
	3	\$950,000
	4	\$750,000
	2	\$700,000
Veritas Health Systems	3	\$550,000
EonVita Research Alliance	3	\$500,000
NovaTerra Group	4	\$350,000

TASK

Generate new donor email for Luca Ferriera

Use AI to Generate First Draft



Luca Ferriera
CEO, ACME CO. LTD

ESTIMATED CAPACITY
\$350,000+

KINDSIGHT SCORE
4

PHONE
(555) 632-0012

EMAIL
lferriera@acme.edu

Profile Alerts

Current Insight
Hidden Gem

New Insight
Distinguished Philanthropist

Current Giving Velocity
Decelerating

New Giving Velocity
Accelerating

New Matched Records

CHARITABLE DONATIONS		
NAME	TITLE	WORK STATE
☐ Luca M Ferriera	CEO	New York

Insights

 Hidden Gems 12	 Distinguished Philanthropist 14
 Not Now Prospect 17	 Your Champion 24

The Highest Quality Data, Always

44+

Premium Data
Sources

220M+

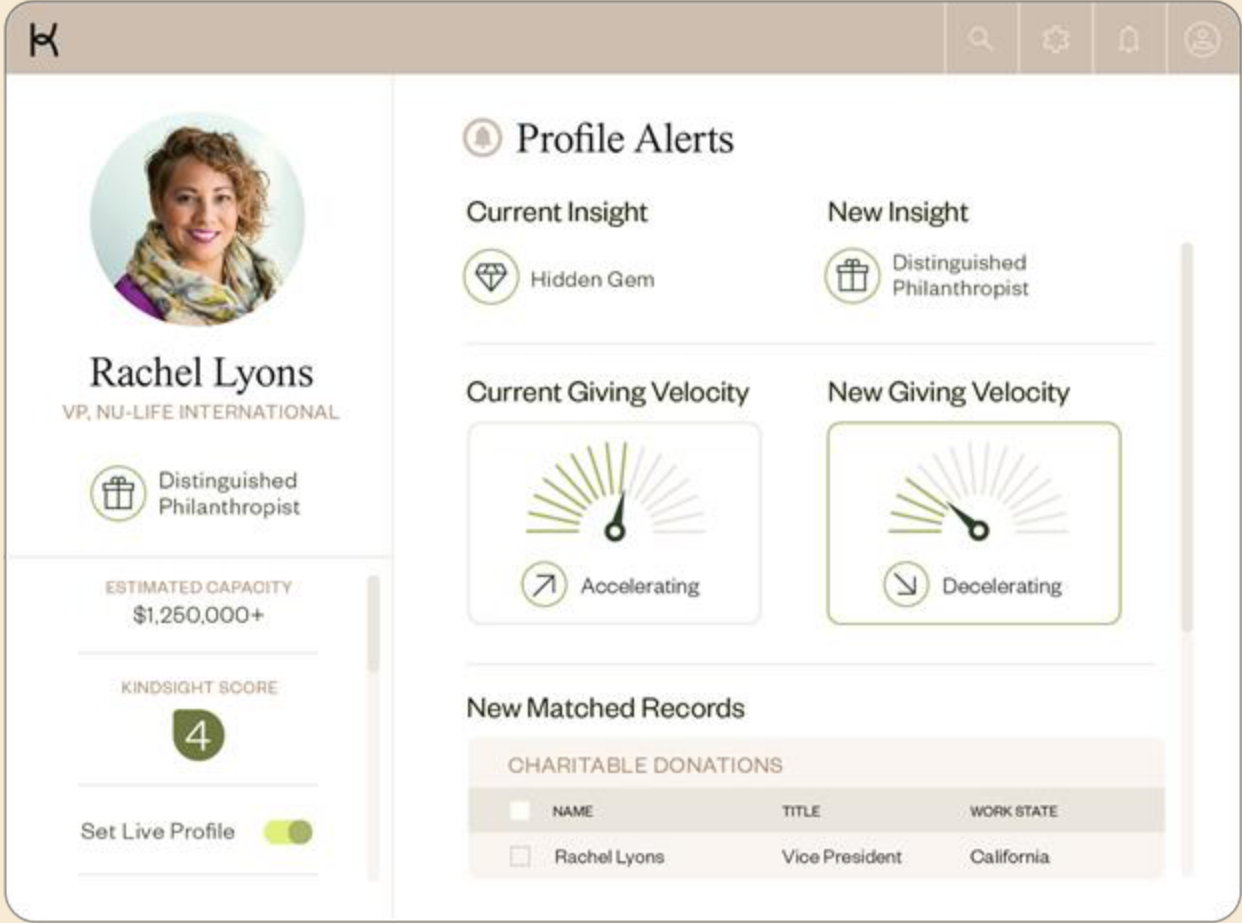
Gift Records

1.2B / 260M

People

Companies

Static data loses value the moment you capture it





30% of donor data becomes
outdated every year



Appends

Screening Results

☐	Name	Address	Kindsight Score	Appends
☐	Ellen Gladstone	1550 Mystic St...	4	(865) 684-9956
☐	Jordan Lee	679 Golden Lane...	2	(682) 684-6689
☐	Alex Carter	45 Main St...	1	(423) 487-254

Appends Mobile Phone	Appends Email
(865) 684-9956	ellengladstone@gmail.com
(682) 684-6689	jordan.lee@gmail.com
(423) 487-254	acarter@email.com
(789) 668-9956	morganh@email.com
(225) 334-7896	aamitchell@gmail.com

Create New Screening Project

Appends

Your organization has 5,000 appends available.

Data Cleansing

Address update (NCOA)

Standardization

Contact Information

Phone

Email

Next

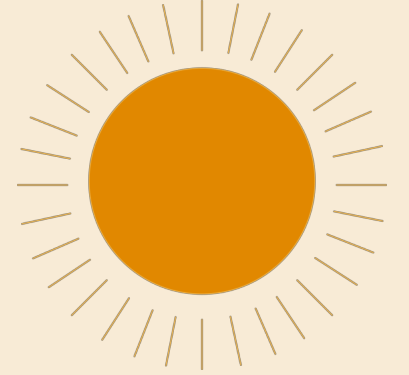
TASK

Clean donor database before year-end campaign

Run Appends to update addresses, emails and phones.

Trusted by 4,000+ global nonprofits





A Legacy of Leadership, a Future of Momentum.





Meredith Mitchell

SR DIRECTOR OF PRODUCT
MANAGEMENT





Discover



Inspire



Grow



iWave



Connect



AdvancementRM



Ascend



Leaders build momentum



Ascend

Relationships

CONSTITUENT	ROLE
Omar Aziz	Parent
Aria Wells	Coworker
Rayan Ali	Ex-Spouse
Will Clarke	Friend



Nasir Aziz

COO, GREENLEAD

PHONE

(555) 392-5220

EMAIL

nasir@greenlead.io

PRIMARY CONSTITUENT TYPE

Alumni

PRM

Wanda Ellery

OVERVIEW

CONSTITUENT DETAILS

PROSPECT

NAME

Nasir Aziz

MARITAL STATUS

Single

PRONOUNS

He/Him/His

AGE

52

CLASS YEAR

1995

Giving Summary

LIFETIME FUNDRAISING

\$350,000

LIFETIME CASH

\$250,000

MOST RECENT GIFT

01/31/2025

Prospect Information

ESTIMATED CAPACITY

\$50,000

STAGE

Solicitation

CONSTITUENT TYPE

Alumni

Overdue Tasks

Call: Day 1: Afternoon

Sal Jones

Oct 2

Call: Follow-up on...

Glenn Cho

Oct 8

Call: Follow-up on...

Bri Costa

Oct 10

Dashboard

TEAM'S PROPOSAL PROGRESS

Sal Jones

Bri Costa

Glenn Cho

New Contact Report

Constituent

Adam Collins

Organization

Spektro

Contact Method

Phone

Date

Save

Speed: xGP Batch- The Great Friction Remover

The screenshot displays the 'ascend' xGP Batch interface. At the top, a header bar shows the 'ascend' logo and a navigation menu. Below this, a summary bar for 'xGP Batch' (ID: S24553253) lists various metrics: 5 transactions, \$2,000 total, 2 designations, \$600 total, 0 designations, \$0.00 total, 0 designations, \$0.00 total, and 0 designations, \$0.00 total. The main area is divided into 'Single Entry' and 'Bulk Upload' tabs, with 'Bulk Upload' selected. A large green area with a '+' sign is intended for CSV uploads. Below this, a 'My Transactions' section lists three transactions for James Smith, Michael Johnson, and Sarah Williams. Each transaction row includes fields for Constituent, Gift Info, Tender Info, Designations, and Tributes, along with a 'Save' button. An 'Edit Designation' modal is open on the right, showing a search for 'athletics' and an amount of '\$400'.

CSV

ascend

xGP Batch S24553253

5 \$2,000 2 \$600 0 \$0.00 0 \$0.00 0 \$0.00

Single Entry Bulk Upload

+

My Transactions

	Constituent	Gift Info	Tender Info	Designations	Tributes	
GN0000025	James Smith	Outright	Check \$400	2 Designati...	1 Tribute	Save
GN0000025	Michael John...	Pledge Info		3 Designati...	0 Tributes	Save
GN0000025	Sarah Williams	Outright	Visa \$300	4 Designati...	2 Tributes	Save

Edit Designation

Designation

athletics

Amount

\$400

+ Add Another

Tributes

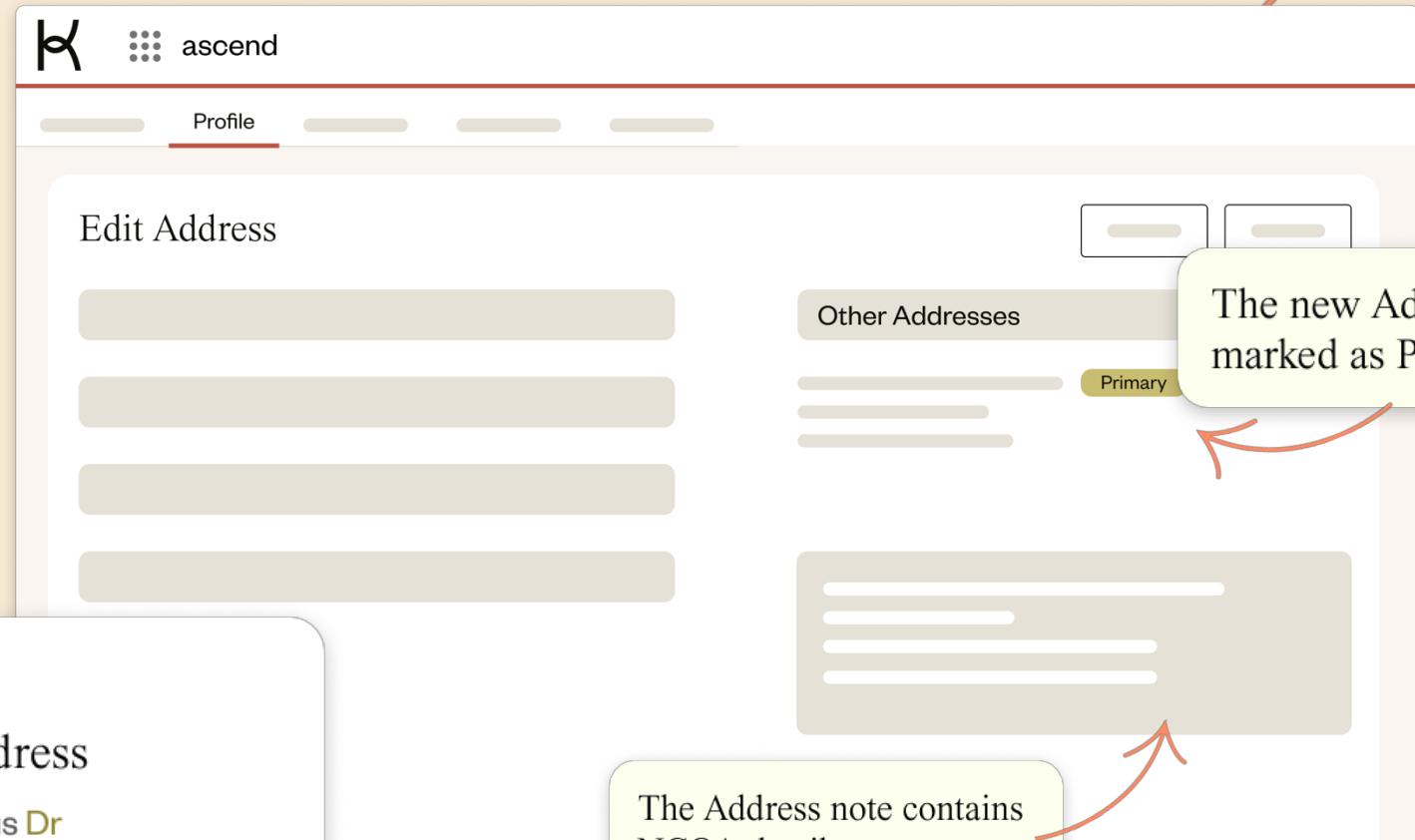
Flexibility: Payment Routing with Stripe



Speed & Expansion: Address Updates & Format

 **Input Address**
222 columbus 7505 road hicago
60601

 **Verified Address**
222 **M** Columbus **Dr**
Unit 7505 **Chicago IL**
60601-7910



ascend

Profile

Edit Address

Primary

Other Addresses

The new Address is marked as Primary

The Address note contains NCOA details

Expansion: Multi-Currency





Discover



Inspire



Grow



iWave



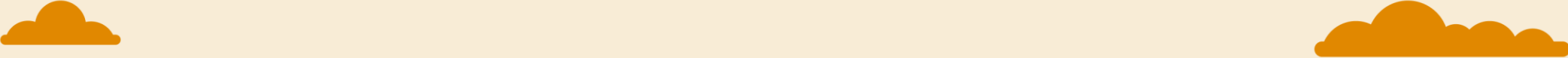
Connect



AdvancementRM

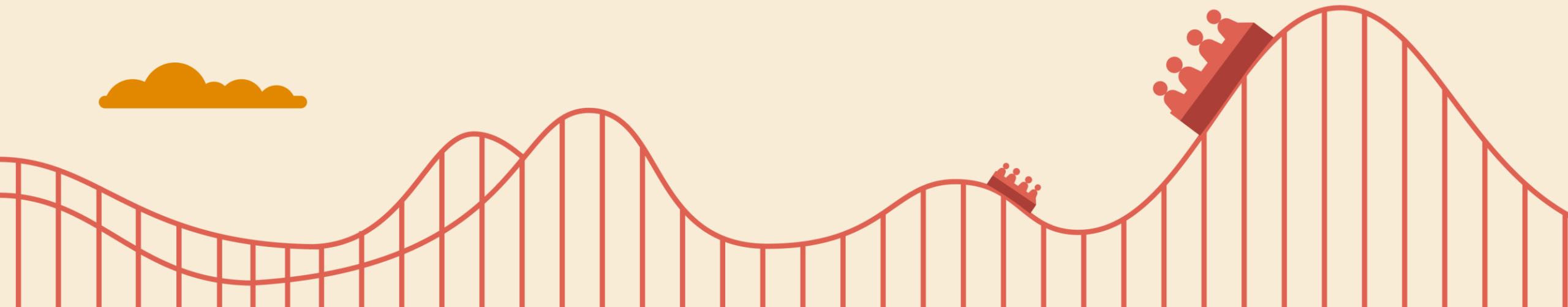


Ascend

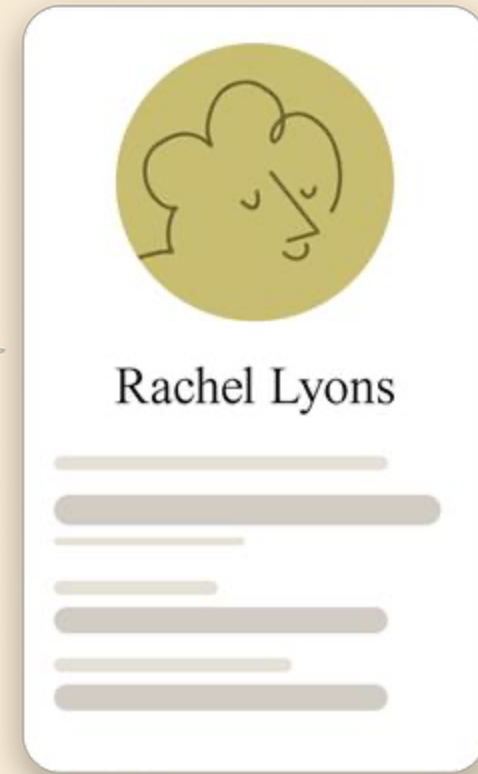
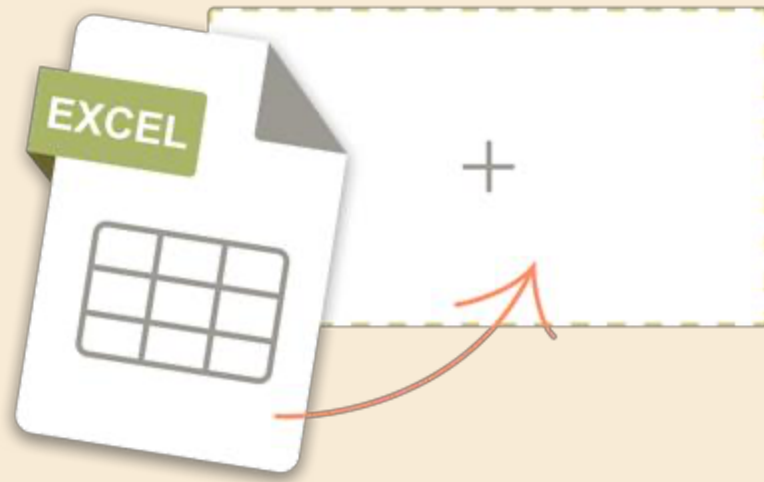


Momentum = Mass x Velocity

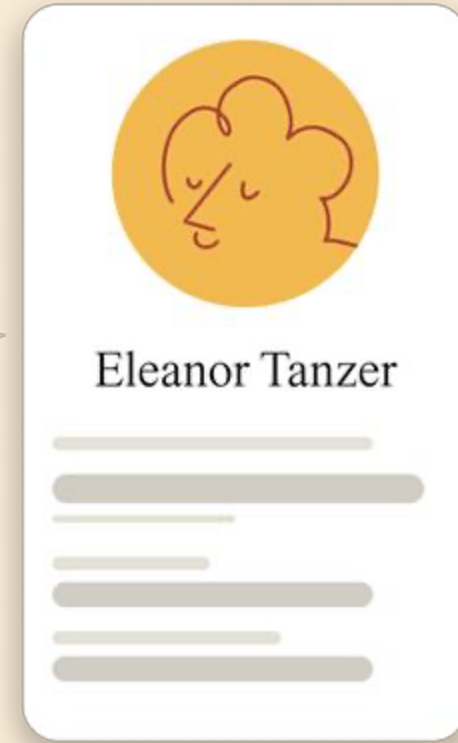
Kindsight Momentum = Mass² x Velocity²



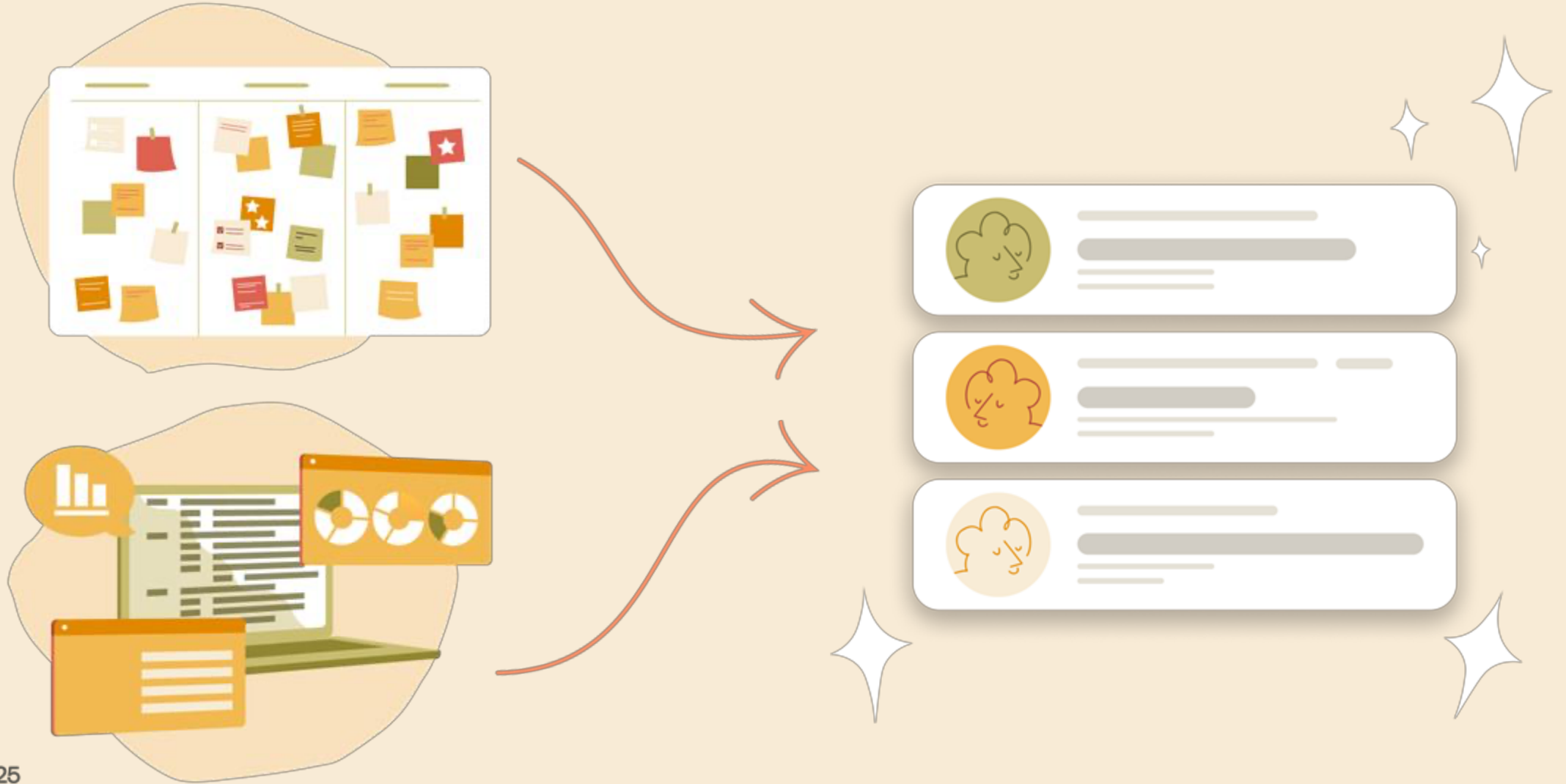
Speed: CleanData+



Flexibility: SmartBatch Bio



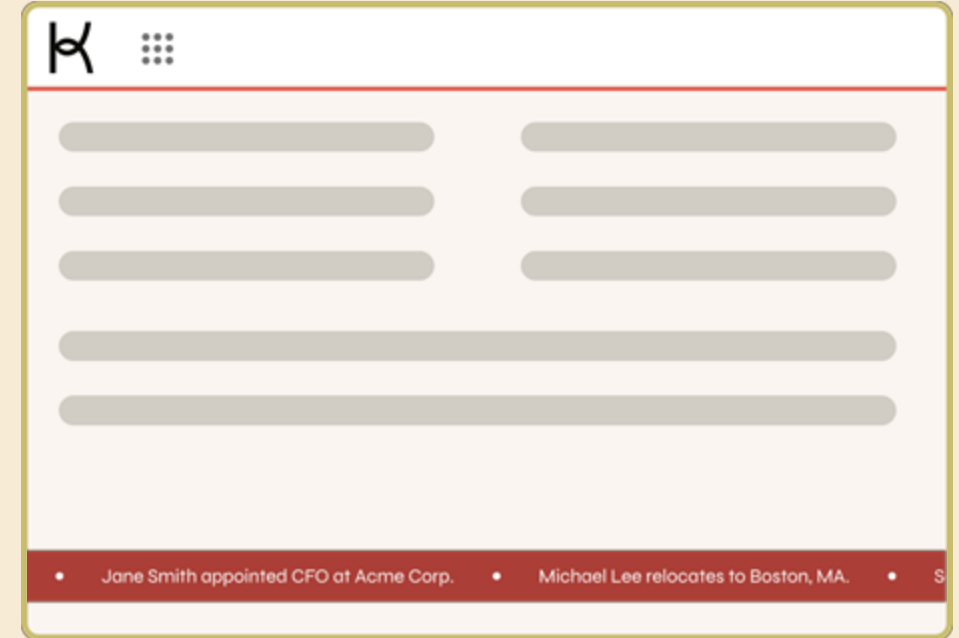
Speed to Expansion: Prospect Queue



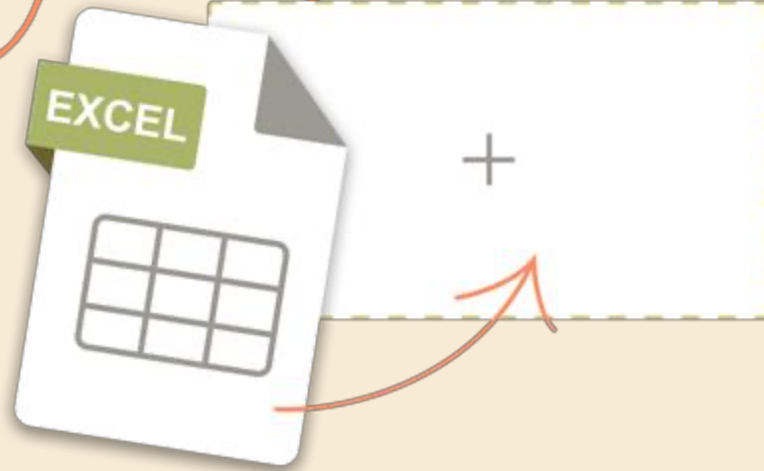
Fundraising Platform



If data is the power to your momentum, adding that data to your CRM is the tracks keeping you on course and allowing your team to run faster



From new suspect list to prioritized prospects in *minutes* not days



ascend

Interim
INT-0000508

Interim Processing

[Process](#)

Information

Donor ID: New Donor ID: 00033132
First name: Ellen Constituent: **Ellen Gladstone**
Last name: Gladstone Status: Completed

Personal Information

Relationship Information

Kindsight

[PDF](#) [Link](#) [Sync](#)

Kindsight Score
3

Estimated Capacity (5 yr.)
\$2,867,315

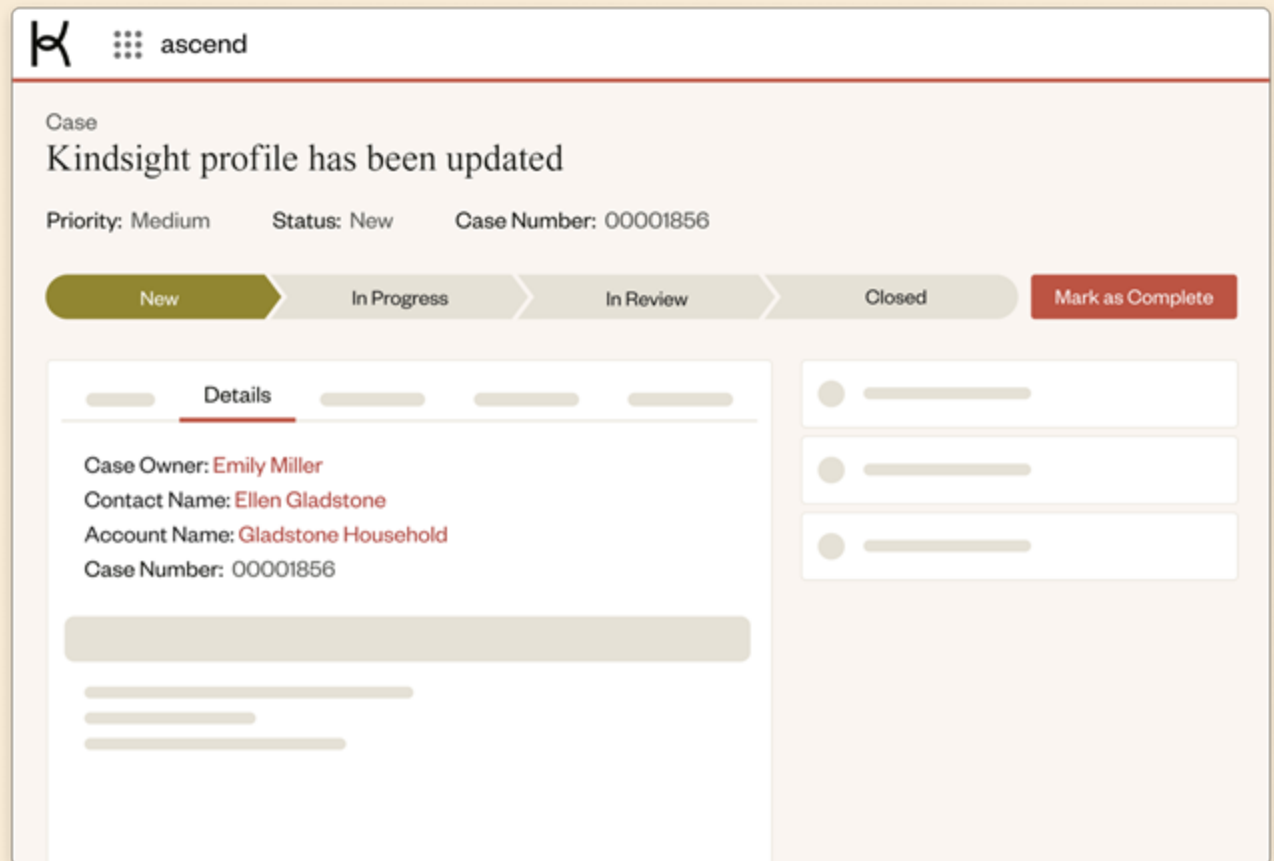
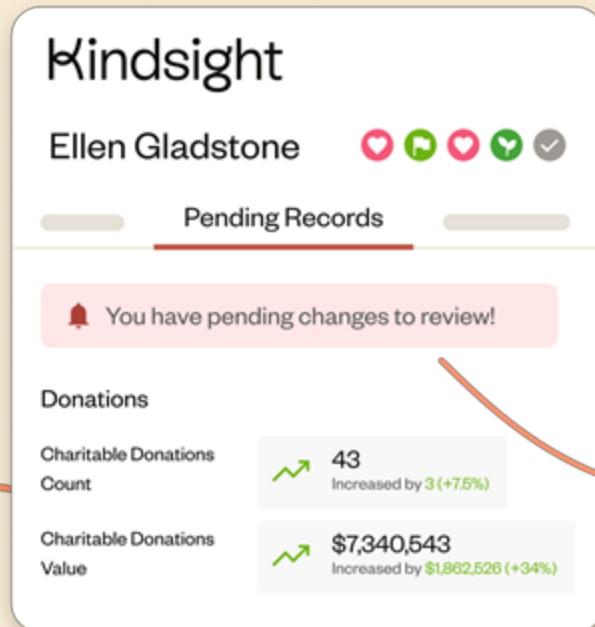
Cultivation
Personalization

Engagement
Leadership

Giving Velocity
Accelerating

4 Propensity to Give
4 Affinity to Philanthropy...
4 Estimated Capacity to...
3 Planned Giving Score
2 RFM Score

A single source of truth in your CRM that updates in real time and automatically notifies you of changes



New views and insights when iWave powers your CRM reporting

TASK

Generate new donor welcome email

Use AI to Generate First Draft

Major Gifts Dashboard

REFRESH

KINDSIGHT SCORES

PROSPECTS BY CAPACITY

< \$100K	4
\$100-500K	3
\$501K-1M	5
\$1M+	3

INSIGHTS

Dr. Mark Lorenzo	Hidden Gem	...
Mrs. Anita Abwar	Your Champion	...

Tasks

	NAME	DUE DATE
	Ellen Gladstone	5/13/2025
Prospect	John T Wilson	5/22/2025
	Lyndsay Rusch	5/27/2025

Notifications

Lyndsay Rusch

SCORE **ANALYTICS** **MULTI-LENS**

KINDSIGHT SCORE 4

- 4 Propensity to Give
- 4 Affinity to Education
- 4 Estimated Capacity

Additional Details

Potential prospects by capacity

67

< \$100K	13
\$100-500K	26
\$501K-1M	18
\$1M+	9

Celebrate Fundraising Platform Early Adopters





Discover



Inspire



Grow



iWave



Connect



AdvancementRM



Ascend



When giving flows,
momentum grows.



The Disconnected Donor Experience



Multiple systems. Manual work.
Missed connections.

Nonprofits Can't Afford Hours to Launch



E-commerce checkout

2 clicks | <30 seconds

Seamless digital experiences set donor expectations



= Lost Generosity

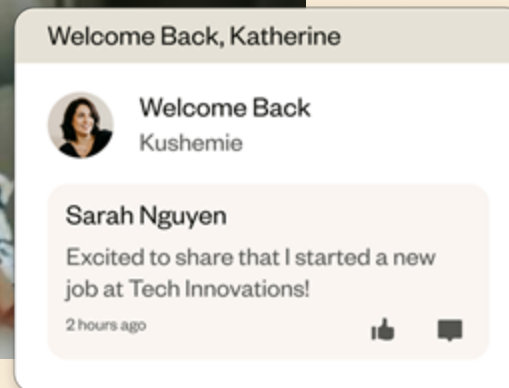
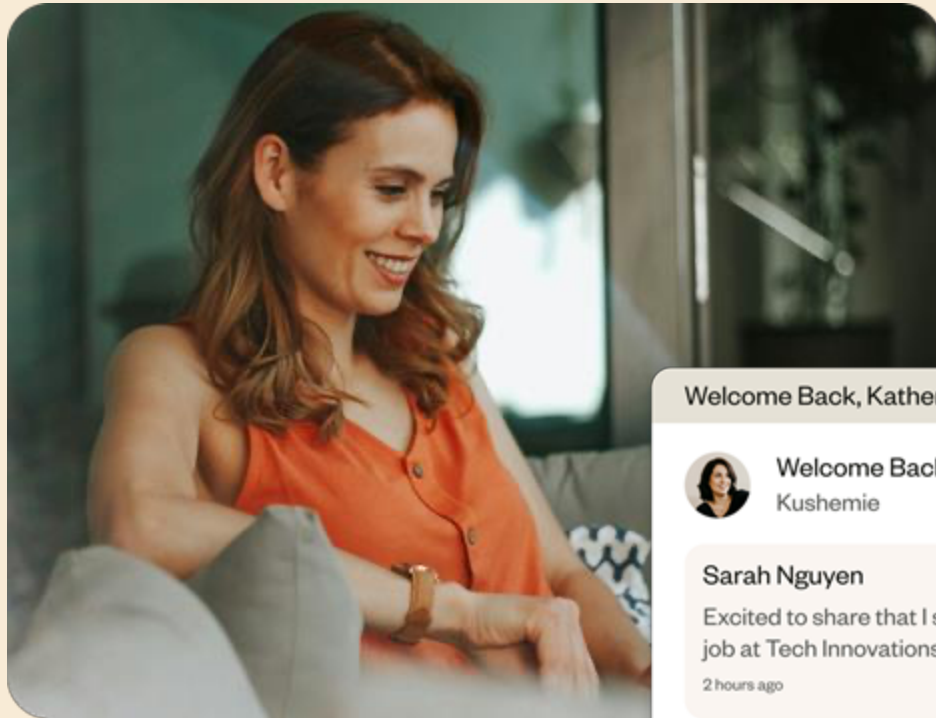


Nonprofit giving form setup

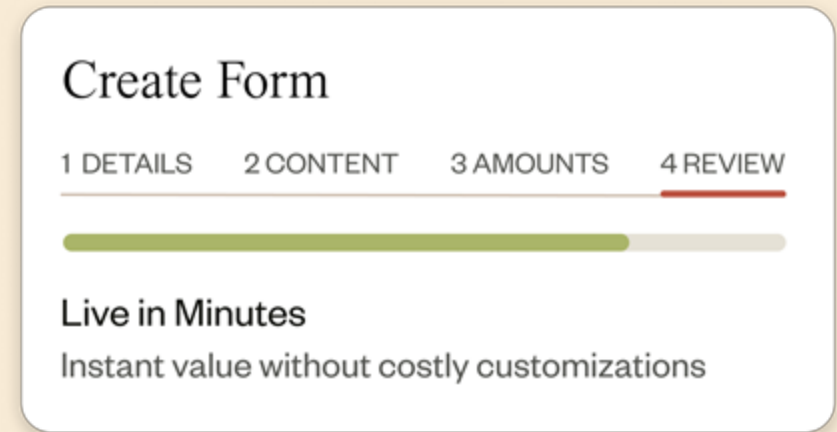
Multiple teams | Hours of work

Manual, specialist-heavy processes cause delays.

Grow Connection Through Momentum



Keep alumni and donors
engaged over time



Instant value without
costly customizations

Connect





 Give

Choose a gift type:

One-Time

Pledge

Number of installments

Frequency

Annual

Choose an amount:

\$25

\$50

\$50

\$50

Choose a designation(s):

☐ Athletics Annual Fund

☒ Neurology

EVENT

Alumni Club
Annual Meet-up

Register





 Giving History

Overview

Giving History

Pledges

Recurring Gift

Matching Gift

Giving By Year

YEAR	CASH	FUNDRAISING	AMOUNT	YEAR END TAX LETTER
2025	\$315	\$450	\$315	View Receipt
2024	\$150	\$300	\$50	View Receipt
2023	\$50	\$50	\$50	View Receipt
2022	\$0	\$0		

[| < > |](#)

Giving By Designation



Neurology

Athletics Annual Fund

Hospital Capital Campaign

Docu

Endown

Downlo

Download
Tax Receipt

Engage your donors, stay connected & inspire action



Everything in one
place



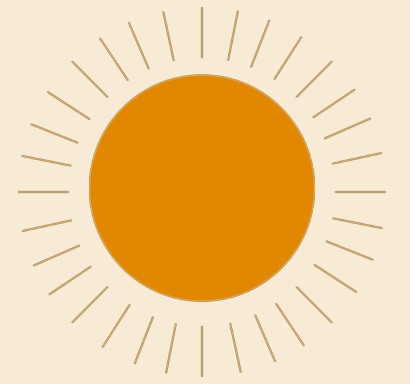
Constituents stay
engaged



Always up to date
data



Build no-code giving
forms



Accelerate giving, fuel
momentum.



Fueling the Momentum Forward



Kindsight

Roadmap Themes



Data &
Fundraising
Platform



Donor
Engagement



AI



Data & Fundraising Platform



Donor
Engagement



AI

iWave Roadmap

Q4 2025

Appends Enhancements

Q1 2026

Institutional Live Profiles

Q2 2026

Grateful Patient Program
Enhancements

Q3 2026

Donor Prediction Models

Fundraising Platform Roadmap

Q4 2025

Outlook & Gmail Integration

Screening Volume
Efficiency

Q1 2026

Institutional
Screening

Due Diligence Data
Integration

Q2 2026

Appends for CRMs

Q3 2026

Donor Prediction Models

Ascend Roadmap

Q4 2025

Membership Enhancements

Q1 2026

XGP Batch:
Additional Gift Types

Q2 2026

Name & Summary Definitions

Q3 2026

Receipting



AdvancementRM Roadmap



Q4 2025

CleanData+ Enhancements

Smart Segmentation:
Generational Cohort

iWave for AdvancementRM

Q1 2026

Extended Campaign Planning

Matching Gift (Benevity)

Q2 2026

Q3 2026





Donor Engagement



Data &
Fundraising
Platform



AI

Connect Roadmap

Q4 2025

Alumni Relations
Enhancements

Q1 2026

Connect for AdvancementRM

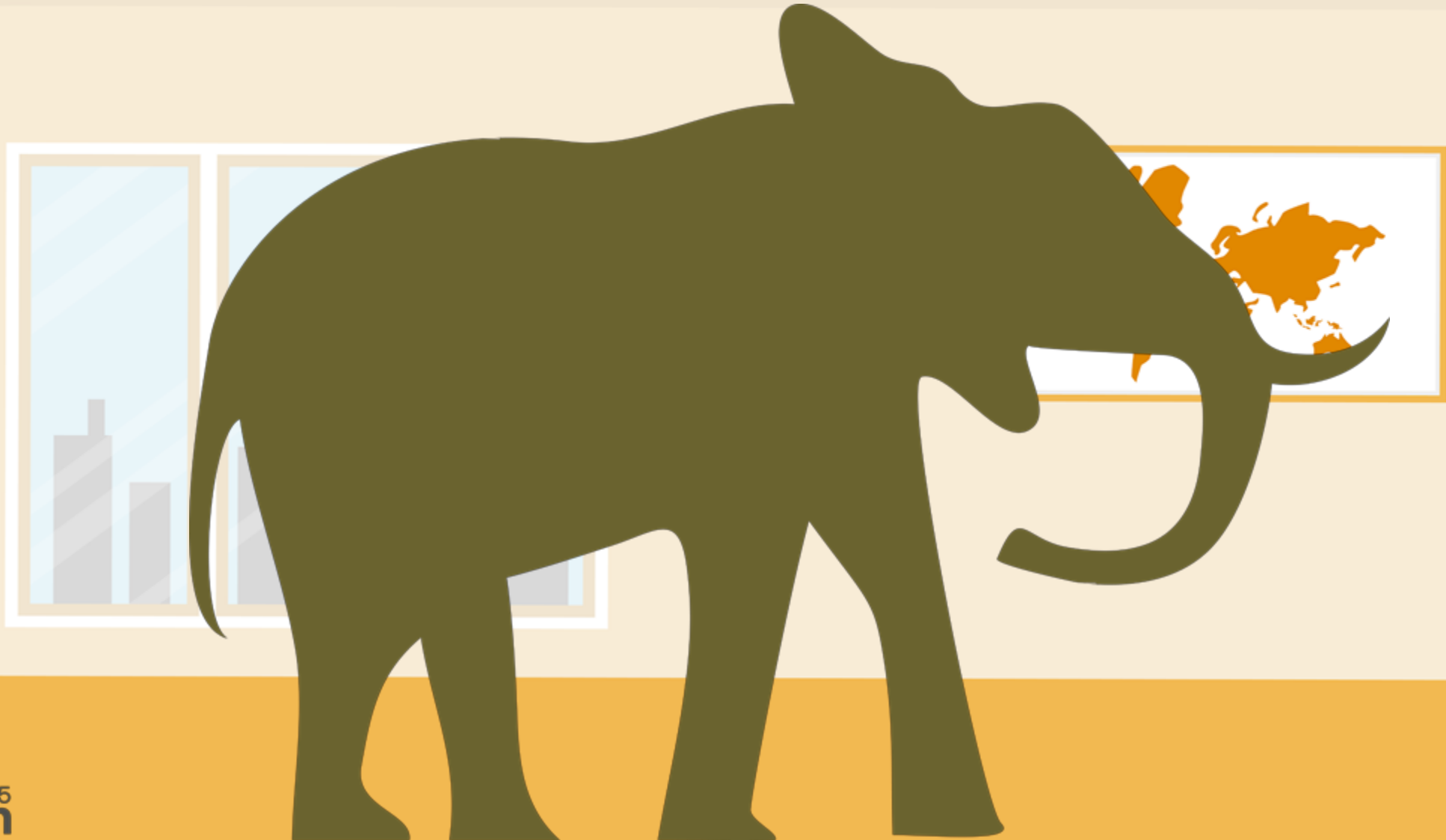
Q2 2026

Giving Hub

Q3 2026

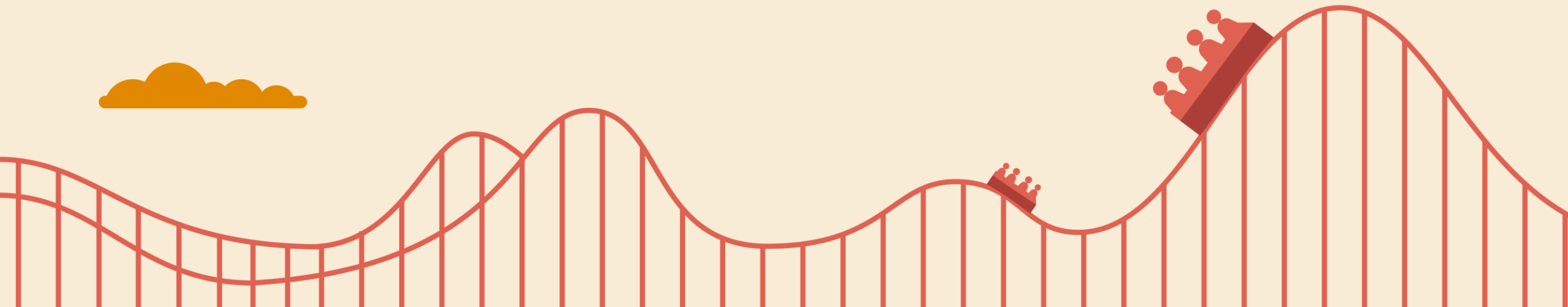
Admin Center

The CRM Path Forward

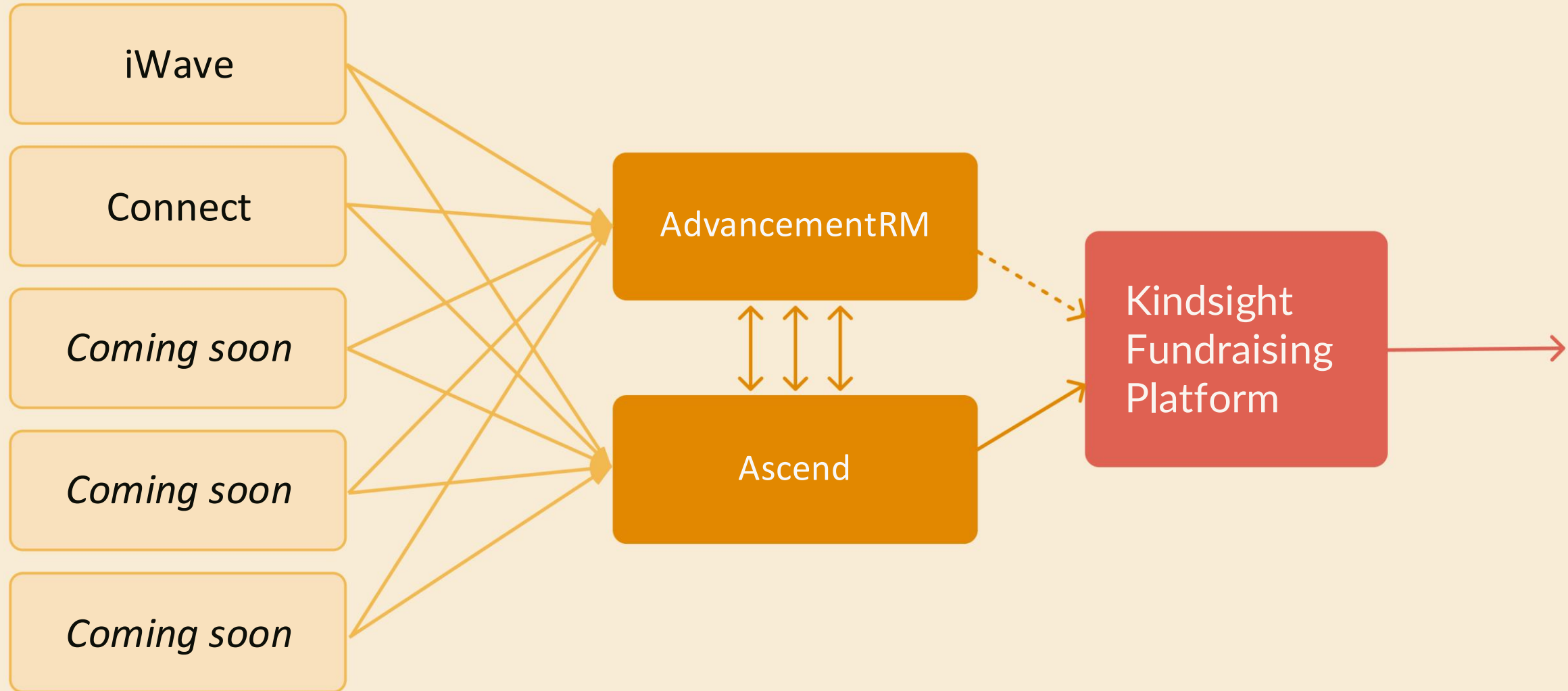


Momentum = Mass x Velocity

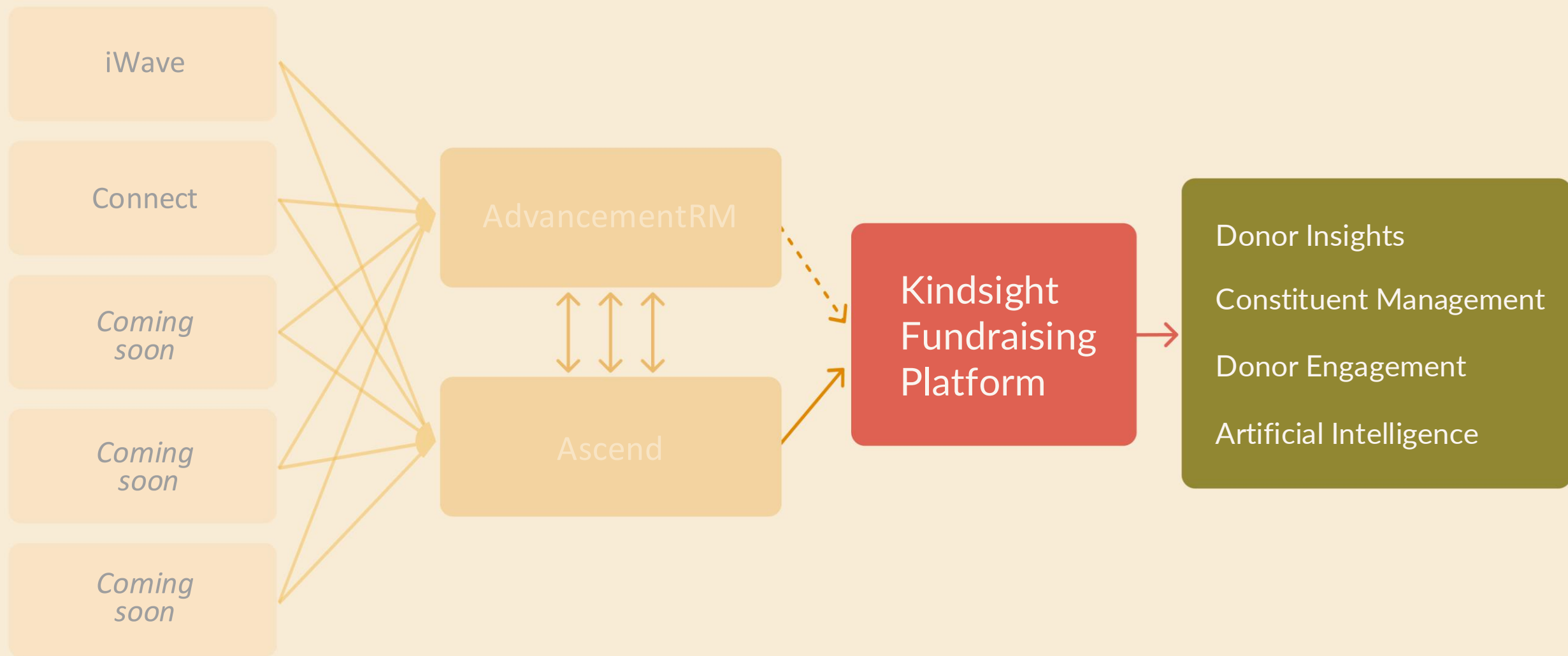
Kindsight Momentum = mass² x velocity²



Kindsight's Fundraising Platform



Kindsight's Fundraising Platform





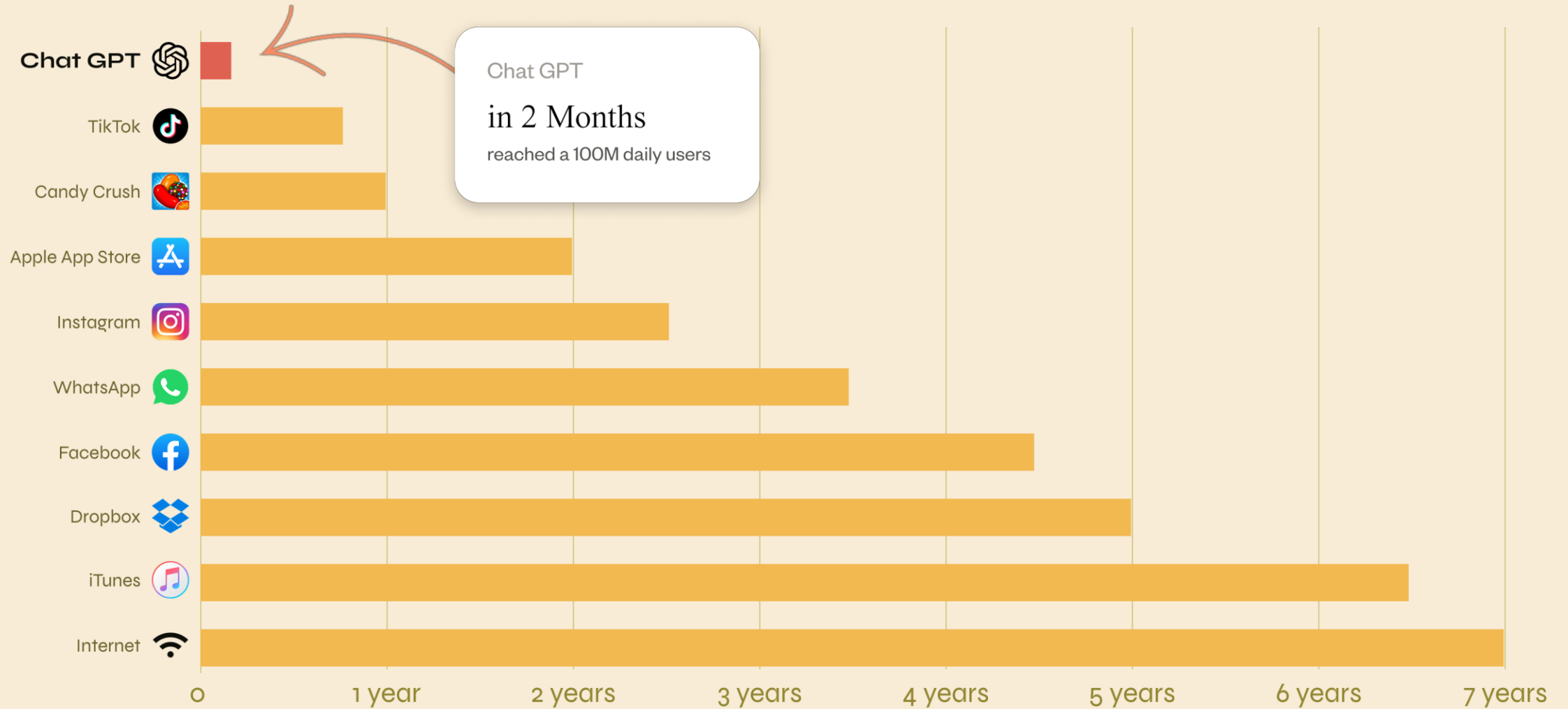
Data &
Fundraising
Platform



Donor
Engagement

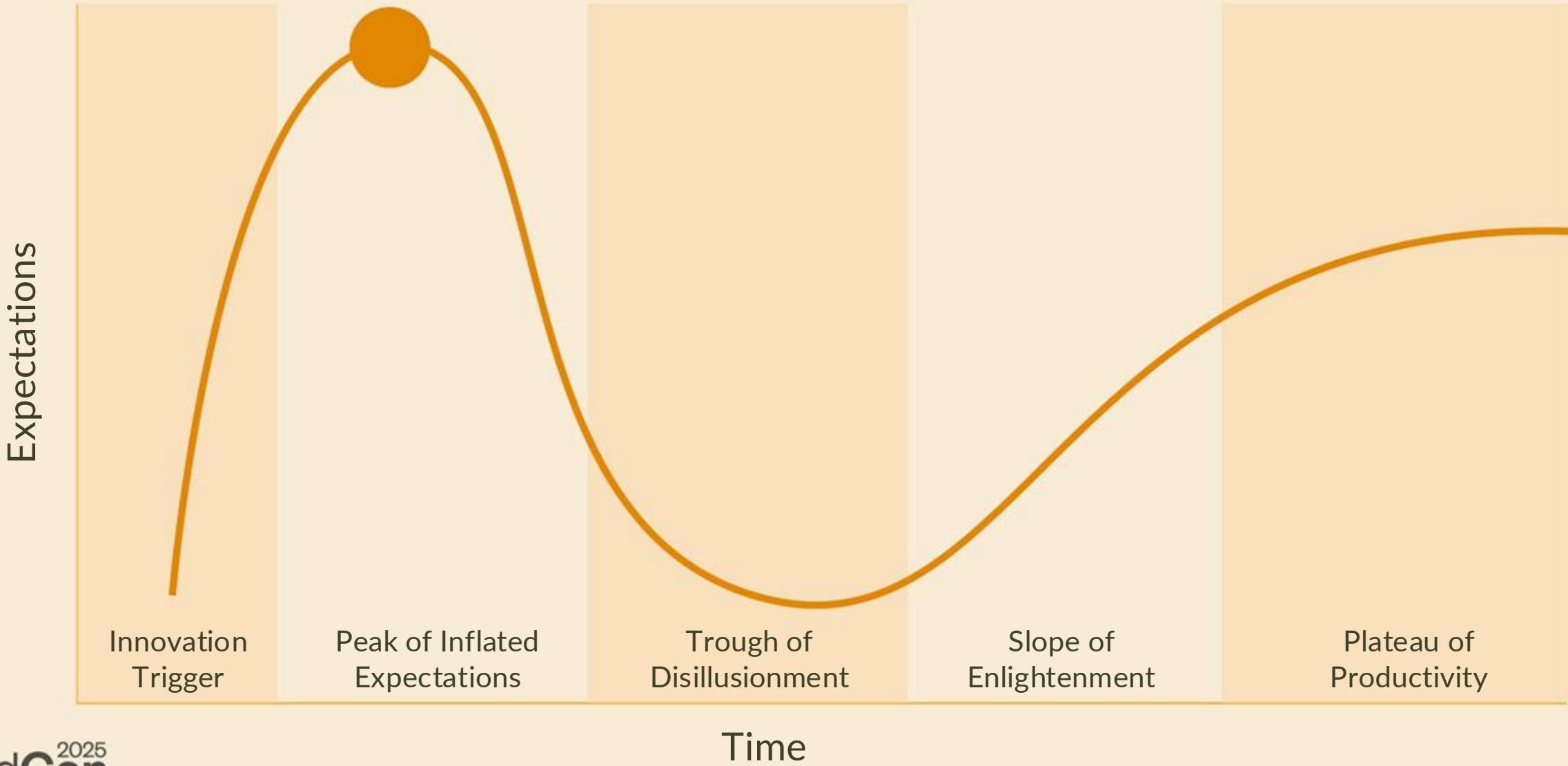
Artificial
Intelligence

How many years it took to reach 100 million users worldwide





Gartner Hype Cycle





CNN news:

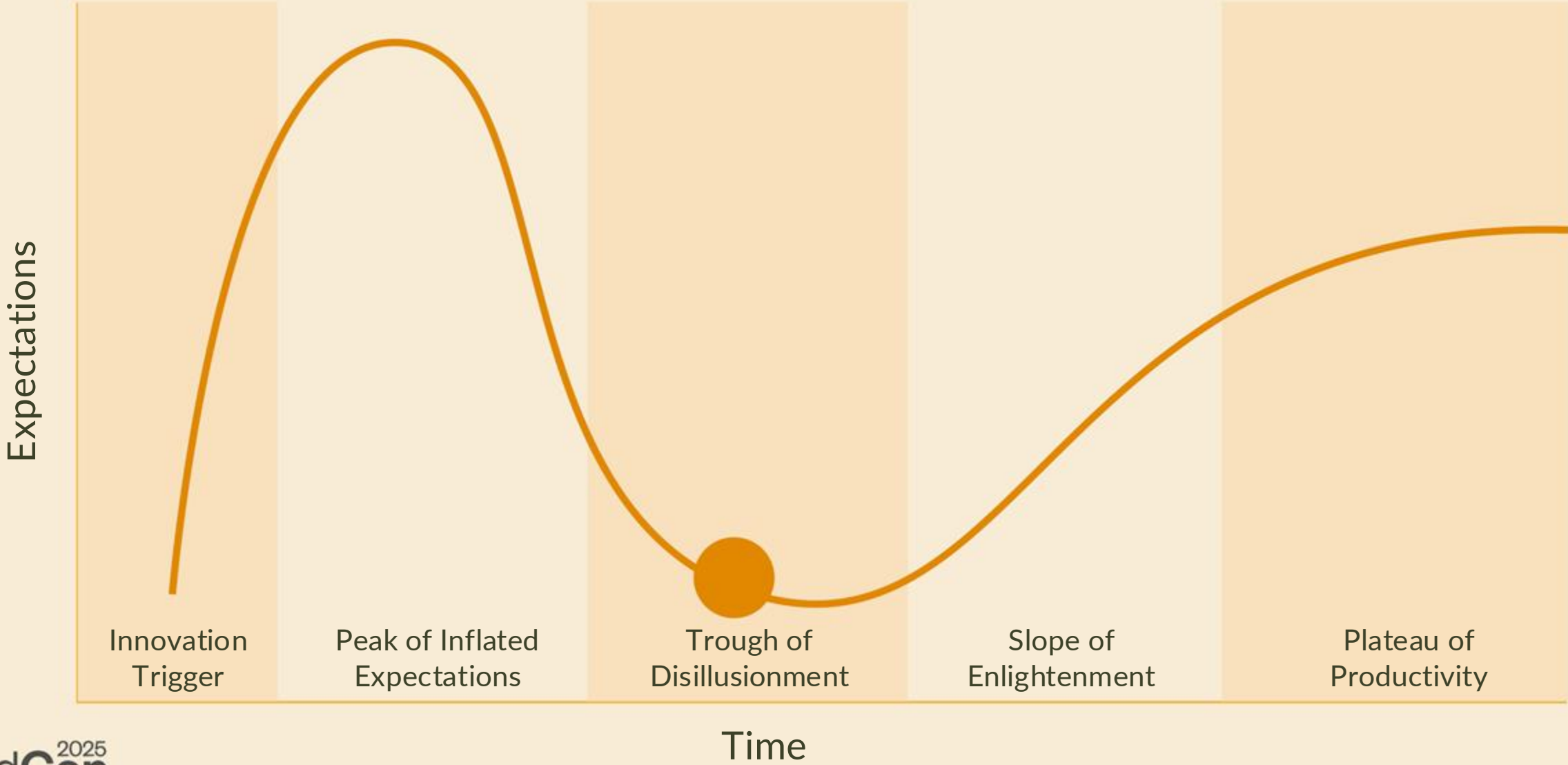
Lawyer apologizes for fake court citations from ChatGPT



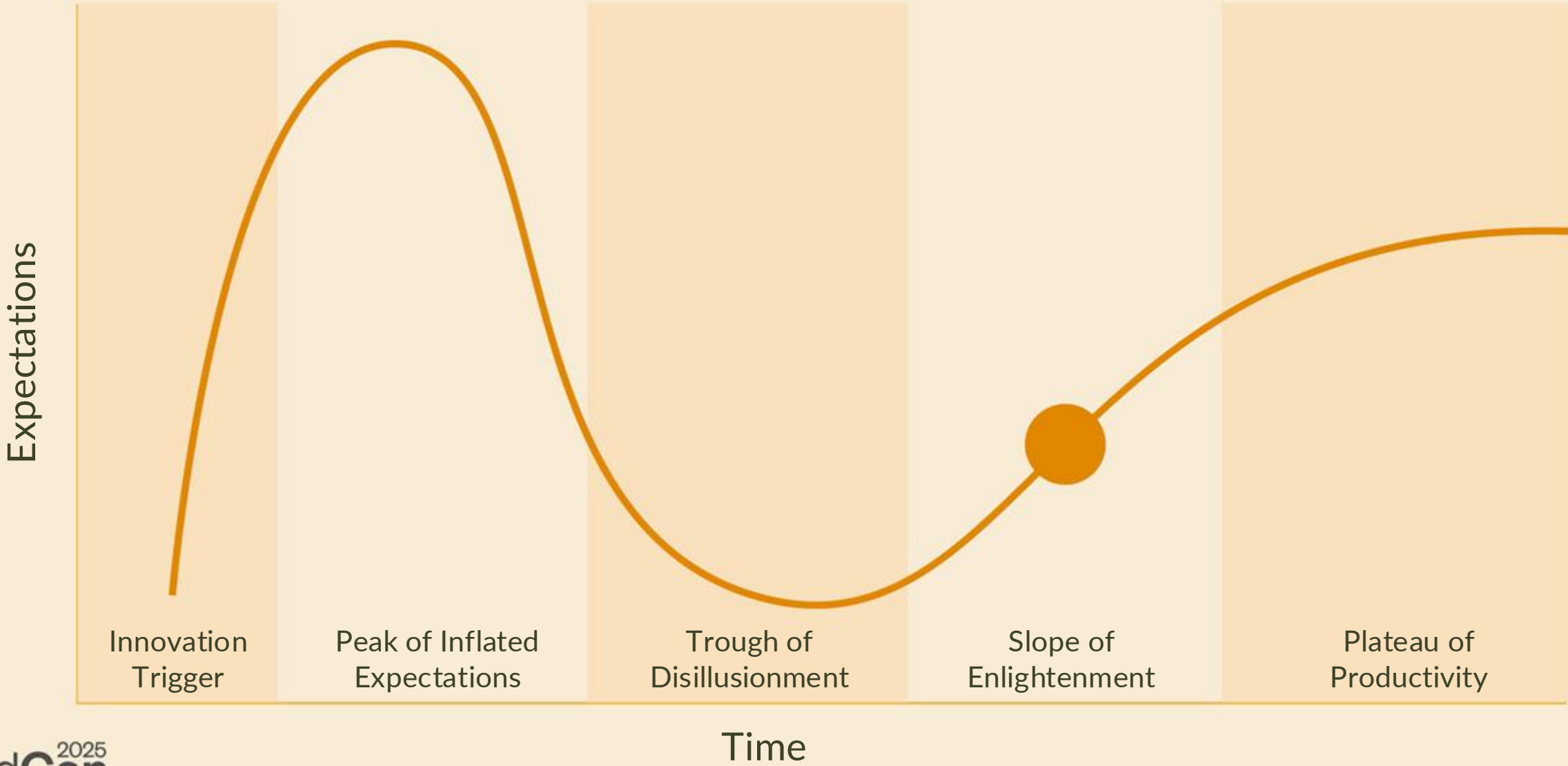
Financial Times:

Google's AI search tool tells users to 'eat rocks' for your health

Gartner Hype Cycle



Gartner Hype Cycle





“We overestimate the impact of technology in the short-term and underestimate the effect in the long term.”

Amara's Law



Donors See Promise and Risk in AI



61%

Enhance fundraising

58%

Improve efficiency

53%

Prove impact



66%

Privacy & security



55%

Bias in decisions



49%

Losing human touch

AI in Fundraising: Momentum vs. Friction



Enhance fundraising (61%)

Improve efficiency (58%)

Prove impact (53%)

+ Would give more (14%)

54% Neutral / Conditional

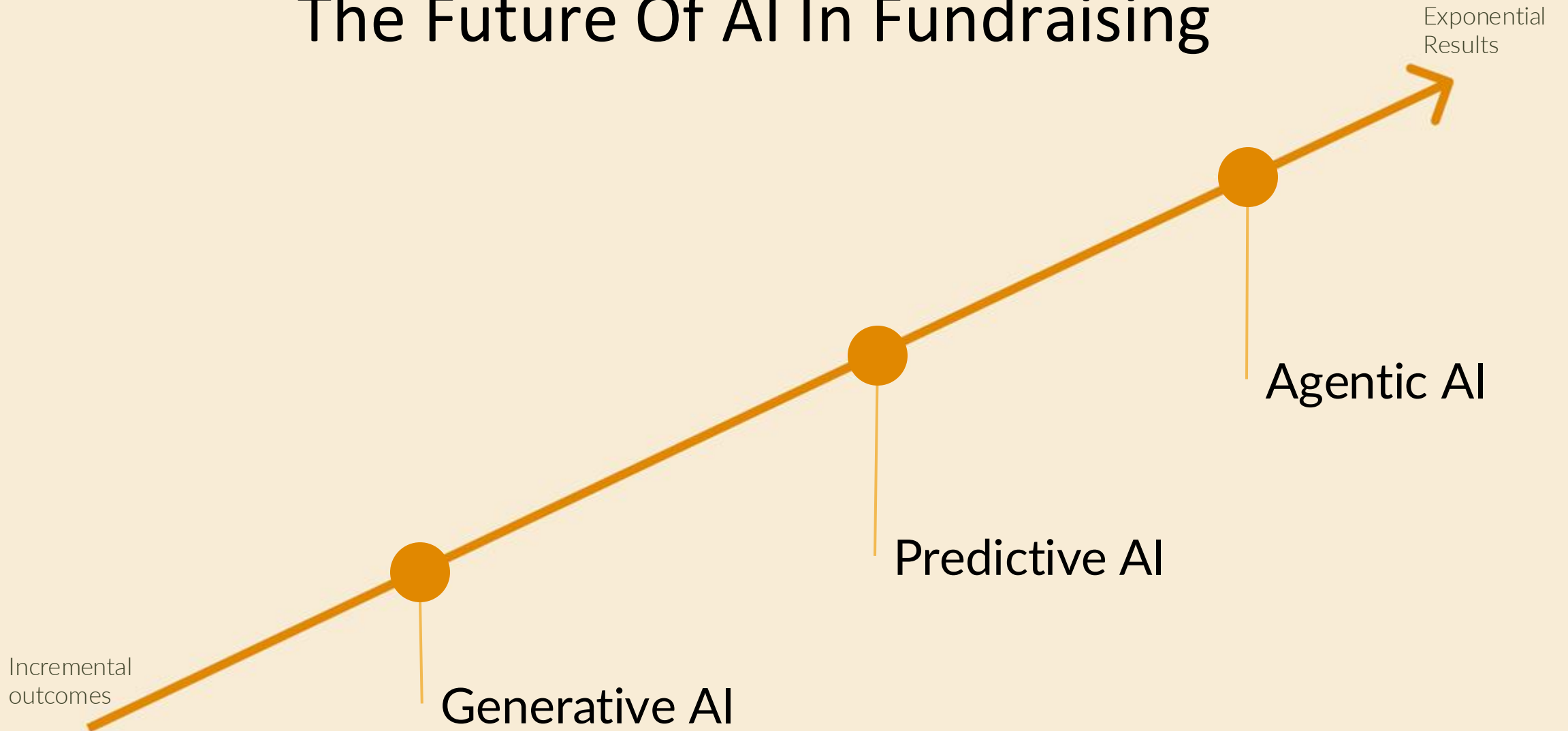
Privacy & security (66%)

Bias concerns (55%)

Loss of human touch (49%)

- Would give less (32%)

The Future Of AI In Fundraising





Discover



Inspire



Grow



iWave



Connect



AdvancementRM



Ascend



Kindsight Intelligence

Kindsight Intelligence: Your AI Fundraising Assistant



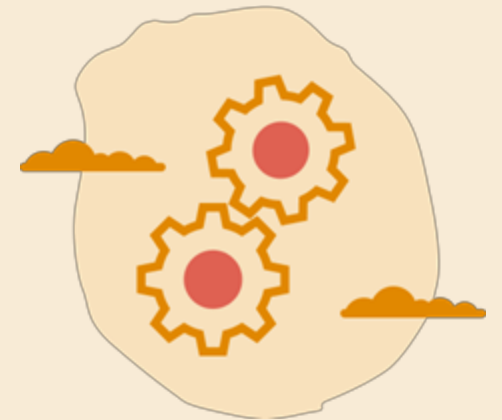
Spot the Right
Donors



Strengthen
Relationships



Accelerate
Outreach



Work Without
Friction

KI for AdvancementRM

 AdvancementRM

 Generate Prospect Profiles

Full Prospect Profile

Select Campaign Members to Generate Prospect Profiles

☐	Type	Contact	Email
☒	Contact	Sally Green	sally.green@gmail.com
☐	Contact	Jordan Lee	jordan.lee@gmail.com
☒	Contact	Jamie Collins	jamie.collins@gmail.com
☒	Contact	Avery Mitchell	avery.mitchell@gmail.com
☐	Contact	Casey Bennett	casey@gmail.com
☒	Contact	Taylor Morgan	tmorgan@gmail.com

 Generate

 Profile Summary
S-0017

Summary Type: Full Prospect Profile
Campaign: 2025 Fall Campaign

Philanthropy:
Sally has made total contributions of \$838,236.24 to the organization. Her largest gift was \$320,000.00 made in December 2022. Her philanthropic activity indicates a strong capacity for future contributions.

 Generated with Kindsight Intelligence

Generate Correspondence 

What kind of letter would you like to send?

Activity report follow up

Tone

Professional

Length

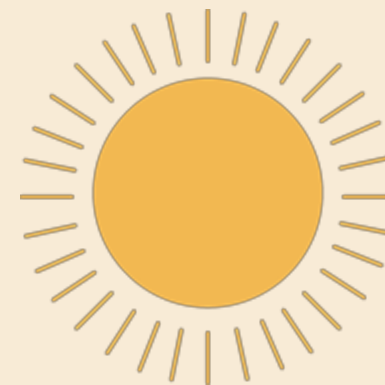
Concise

Letter

Dear Sally,
I hope this message finds you well.

 Regenerate

Your Data Is Safe



Kindsight Intelligence Roadmap

Q4 2025

Chat w/ Data

Q1 2026

KI for AdvancementRM

Q2 2026

KI for iWave

Prompt Enhancements

Predictive Models

Q3 2026

Agentic Flows

Kindsight Intelligence





John Wilson

Account Name

Contact Reports



Contact Report Intelligent Summary

Generated on September 25, 2025 by Sally Green

Executive Summary:

- Strong interest in new campus building
- Open to naming opportunities
- Personal connection to rare blood cancers through grad research

Key Areas of Interest:

- Building naming opportunities
- Rare blood cancer research
- University's arts initiatives

Generated with Kindsight Intelligence

Contact Reports



Constituent Role	Contact Method	Description	Date
Primary	Email	Following up	July 1, 2024



Gift History



Since his first gift in 2013, John Wilson has contributed a total of \$97,450, demonstrating consistent annual support. John's largest gift of \$13,000 was made in April 2023...

Generated with Kindsight Intelligence

Donor Snapshot



23 constituents selected



Donor Name: Eleanor Tanzer



Donor Name: Rachel Lyons

Generated with Kindsight Intelligence

 Regenerate  Download as PDF  Save



Coming Attractions



Credit Card



Online Giving Form



Event Registration



Bank Transfer



Manual Reconciliation

Errors, Delays, Wasted Time

CRM



Credit Card



Online Giving Form



Event Registration



Bank Transfer



Pay

CRM

The background features several stylized fireworks in shades of red and pink, scattered across the upper half of the image. Each firework is composed of numerous thin lines radiating from a central point, with some lines ending in small dots.

Kindsight Pay

Payments Solution



Deep Native
Integration



Flexible Payment
Options

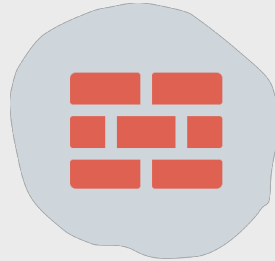


Automated Receipts &
Reminders

Challenges with reporting solutions today

Problem

Rigid + Outdated Reporting



Impact

Leadership at Risk



The background features several stylized fireworks in shades of red and pink, scattered across the upper half of the slide. Each firework consists of a central point with multiple lines radiating outwards, some ending in small dots.

Kindsight Analyze

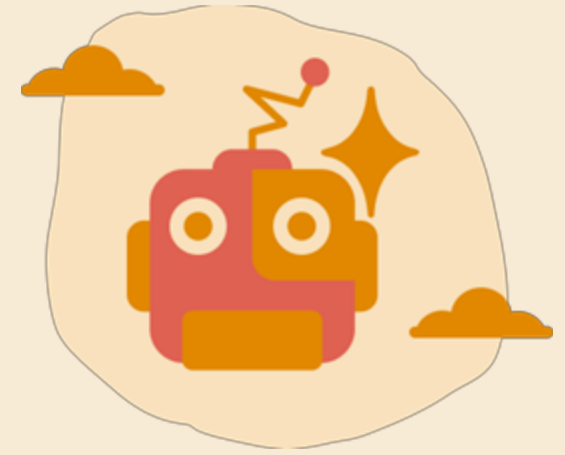
Analyze Solution



Self-Service
Reporting



Advanced Dashboards &
Attribution Insights



Automated Workflows
& AI-Powered Agents



So, Now What?



Overcoming Friction



Build Momentum



Accelerate Change



AI Multiplier



New Launches



Accelerating
Innovation



Thank You!