

Welcome to

KINDFEST

KindCon²⁰²⁶





Cherian Koshy

EVP Market Insights



Don't Miss These KindCon Moments!



**Scheduled demos
in the product lounge**

Check our app
for details.



**Help build guitars
for charity**

Beside the
registration desk.

Today only!



**Leave us a
G2 review**

We're donating **\$25**
for every review left during
KindCon.



**Last day to make your
own swag**

Use your
swag tickets before
the Kindness Awards!



Welcome to

KINDFEST

2026
KindCon



Hemant Kashyap

Chief Product Officer





Last Year, We Talked About **Momentum**

Together—We've Built Momentum

26

Releases across
7 products

>85

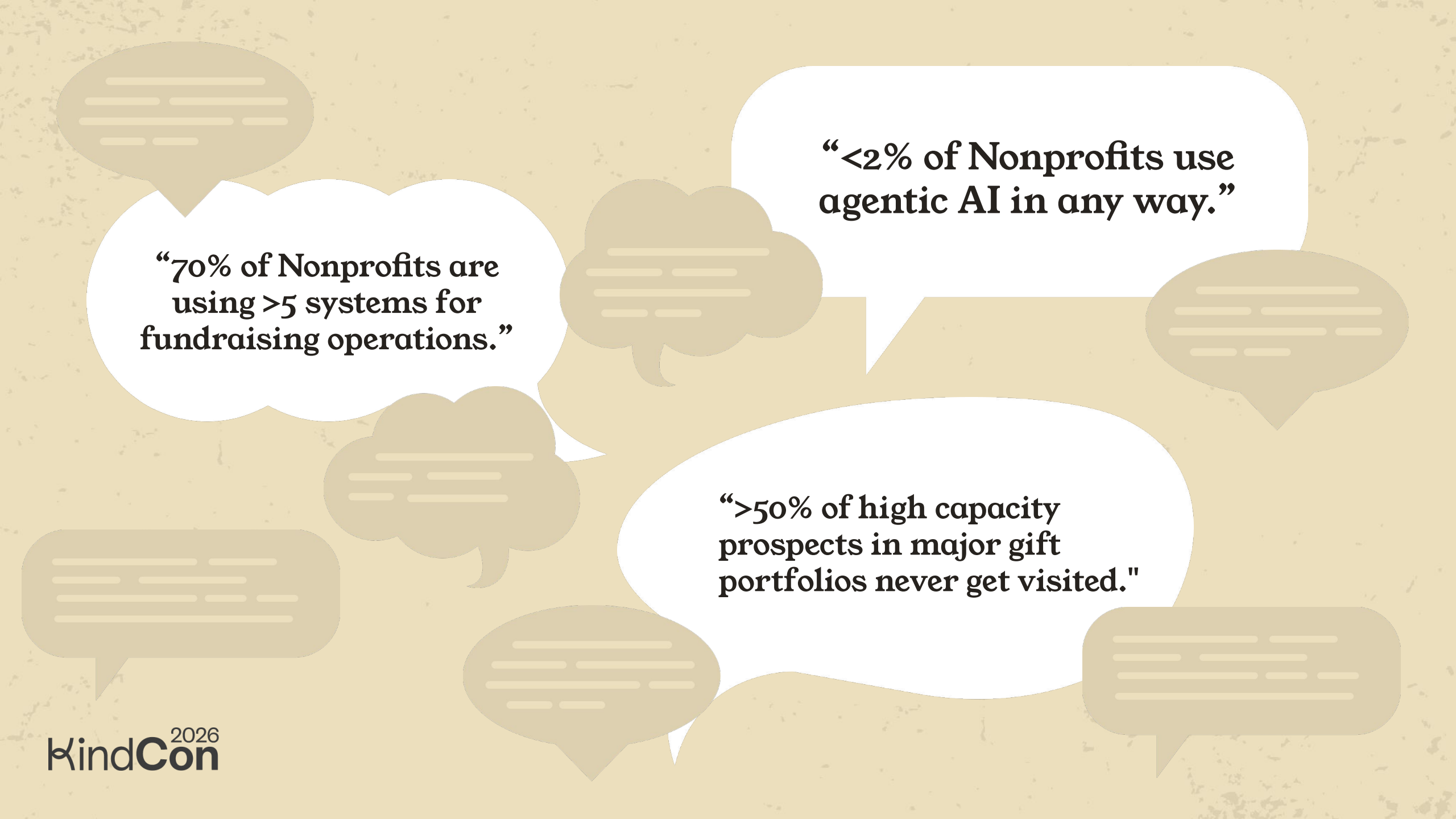
New features

820

New customers



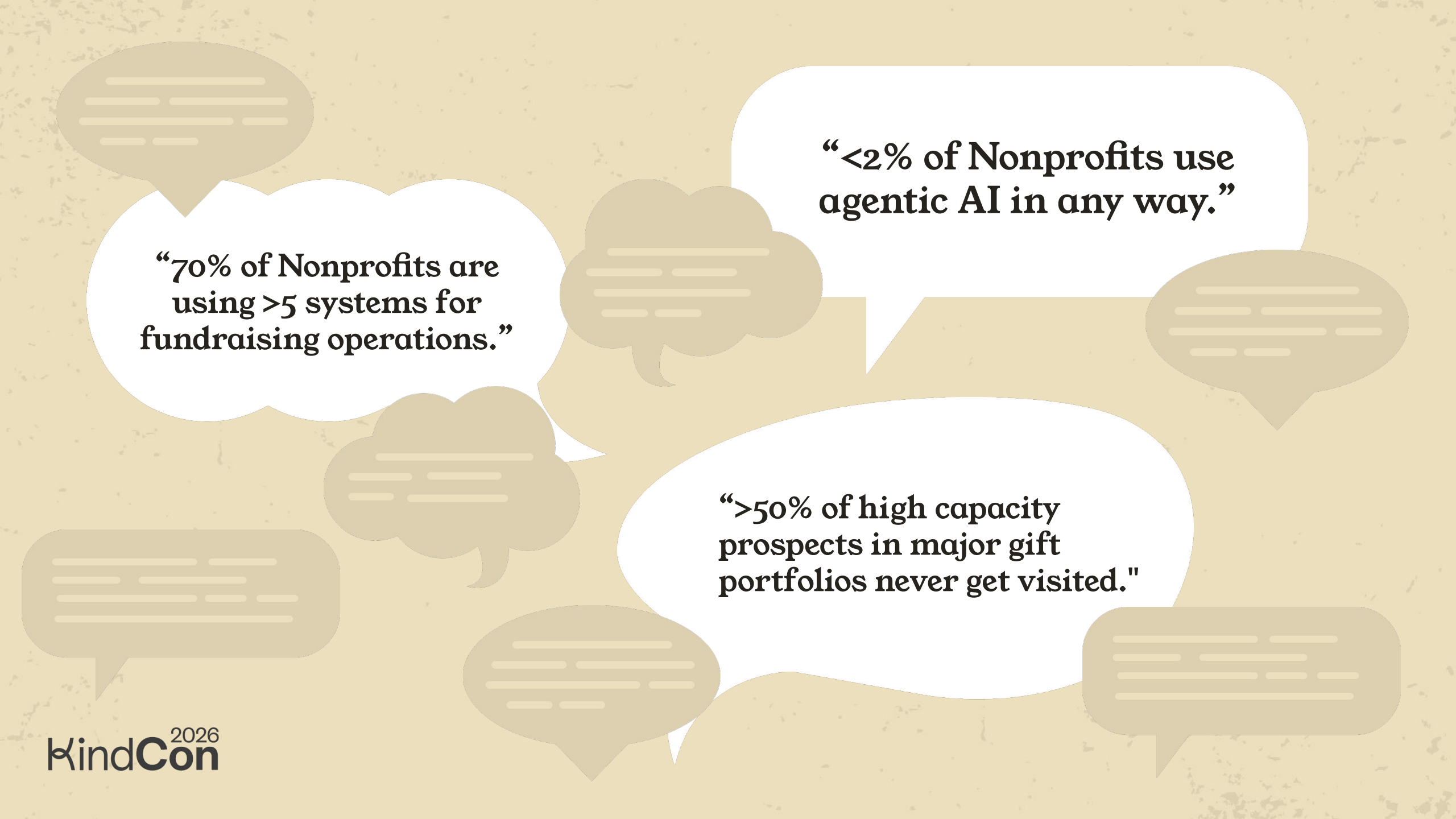
Momentum Isn't Everything



“<2% of Nonprofits use agentic AI in any way.”

“70% of Nonprofits are using >5 systems for fundraising operations.”

“>50% of high capacity prospects in major gift portfolios never get visited.”



“<2% of Nonprofits use agentic AI in any way.”

“70% of Nonprofits are using >5 systems for fundraising operations.”

“>50% of high capacity prospects in major gift portfolios never get visited.”

Harmony

Harmony Is What Turns
Talent Into a *Song*





Rock



Country



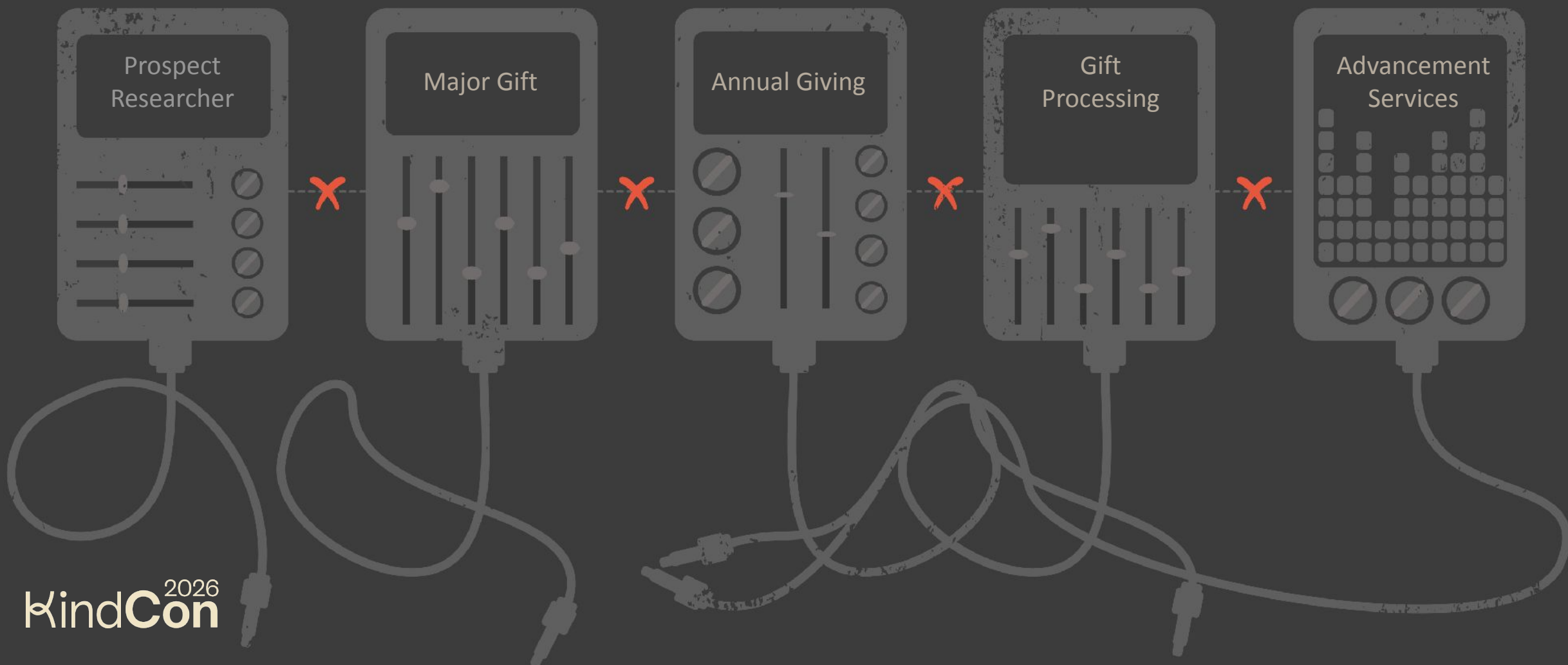
Bluegrass

9 Voices
\$50,000 Raised
... In 1874

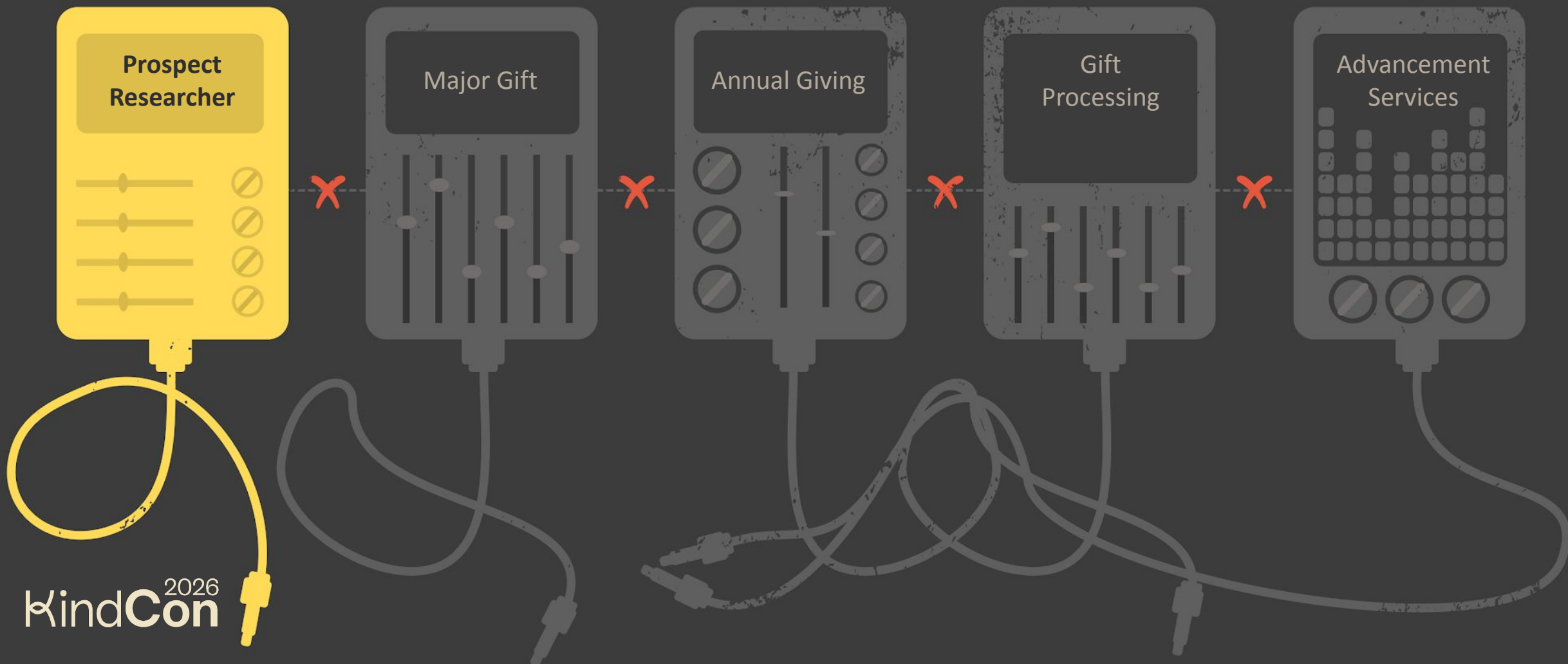


Without It? *Discord*

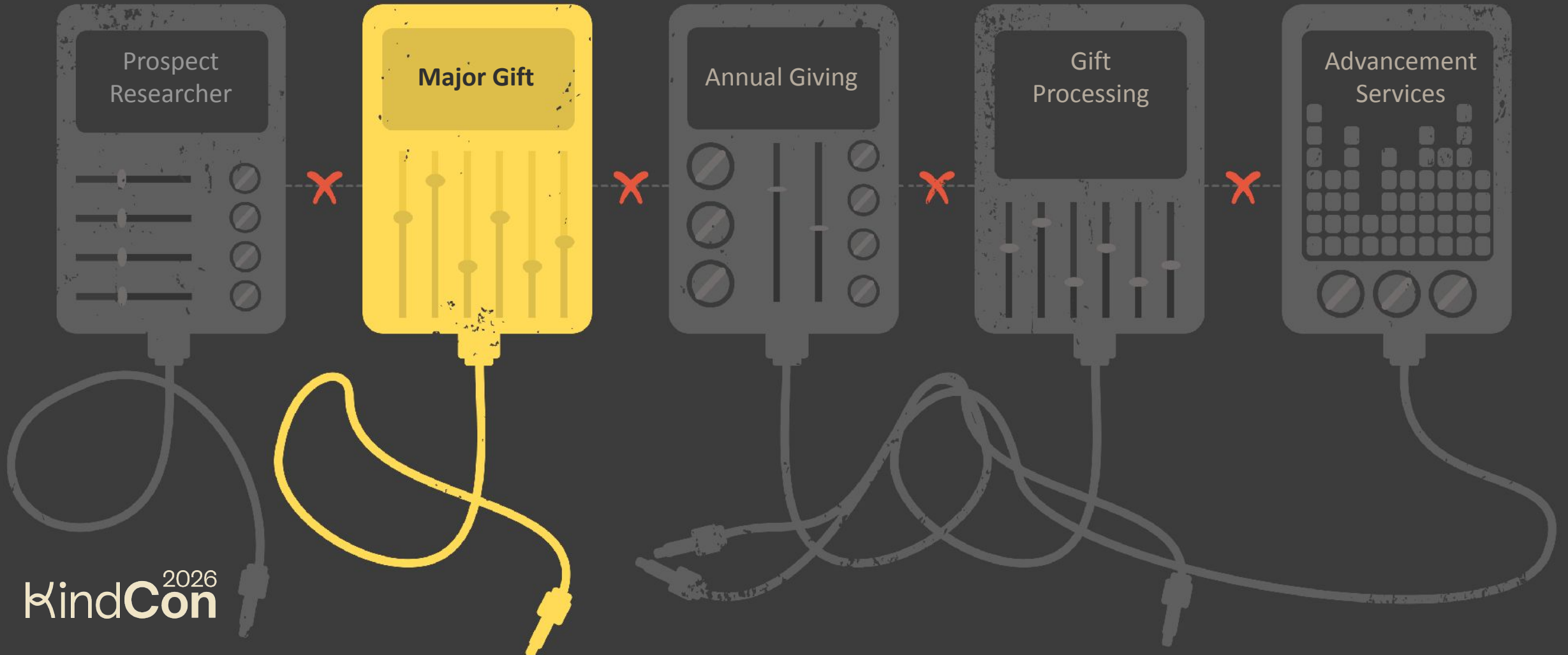
The Fundraising **Discord** Inside Most Organizations Today



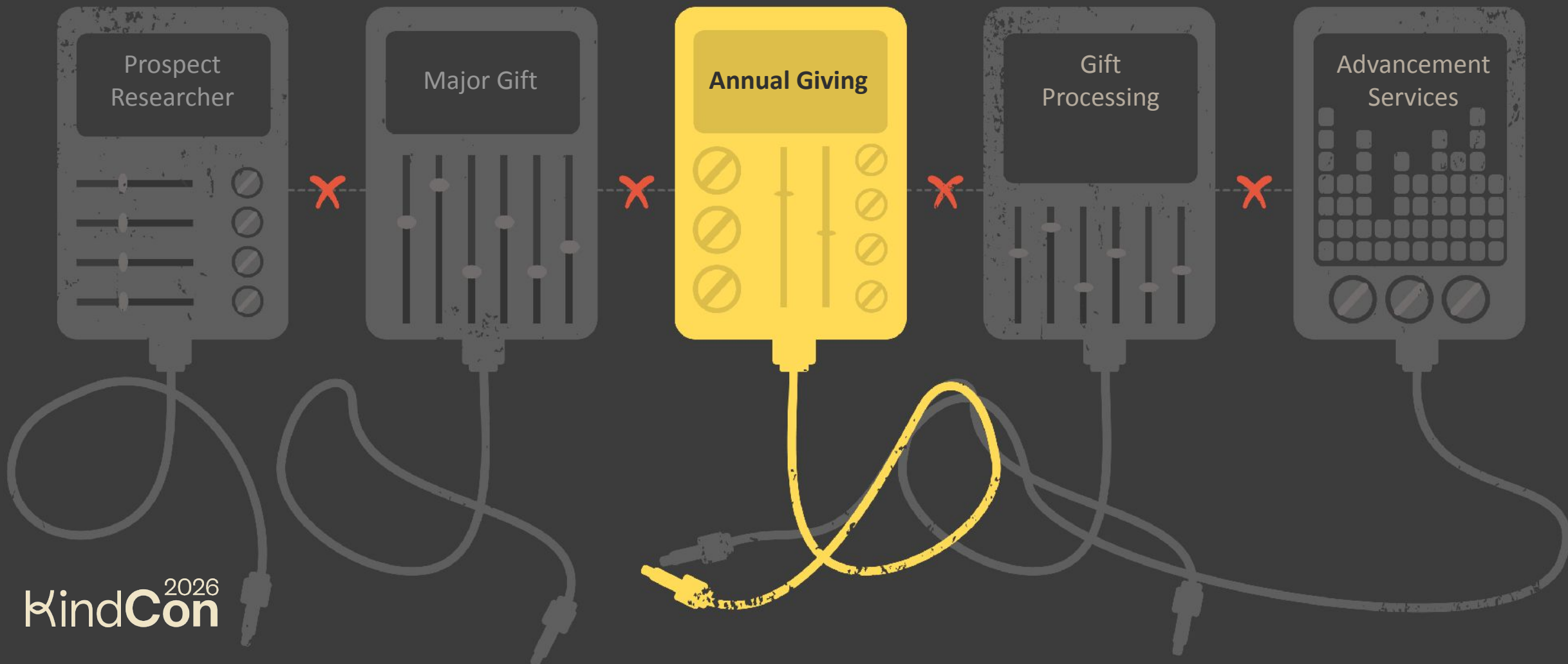
The Fundraising **Discord** Inside Most Organizations Today



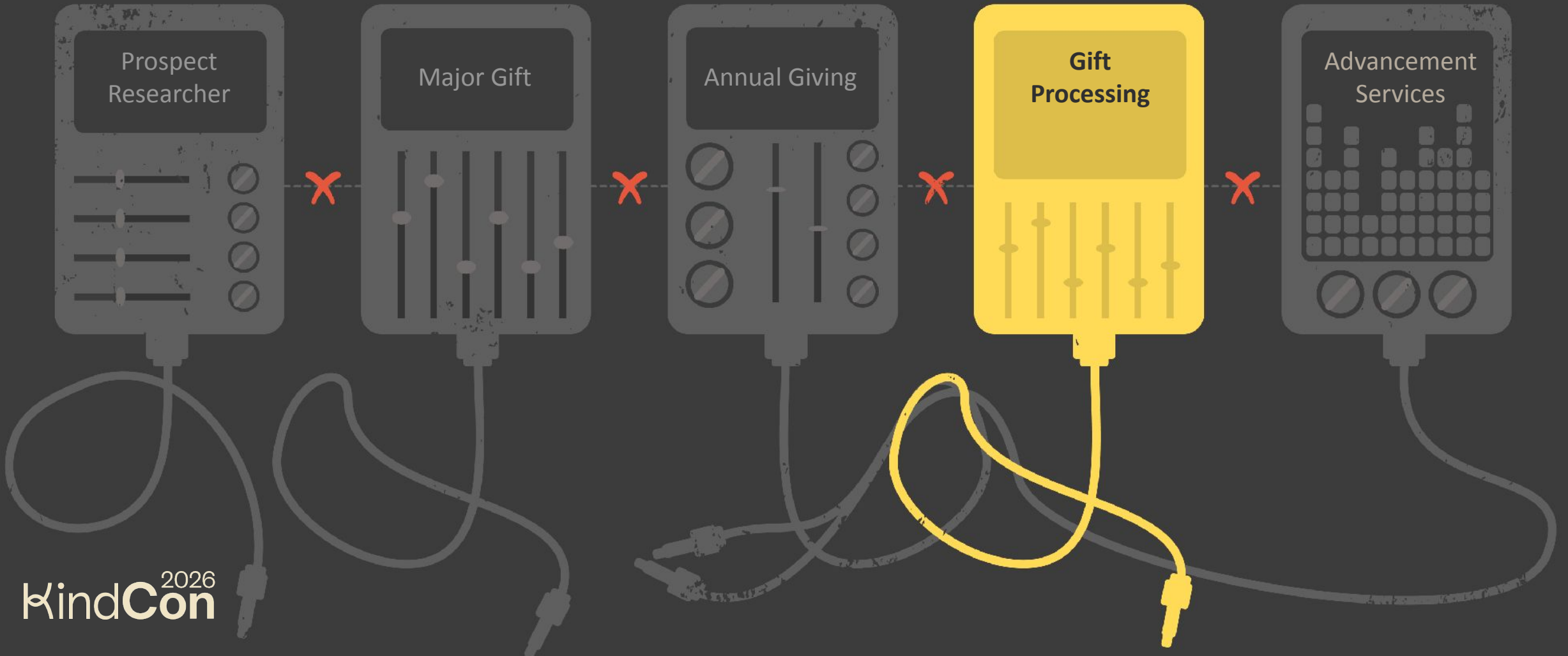
The Fundraising **Discord** Inside Most Organizations Today



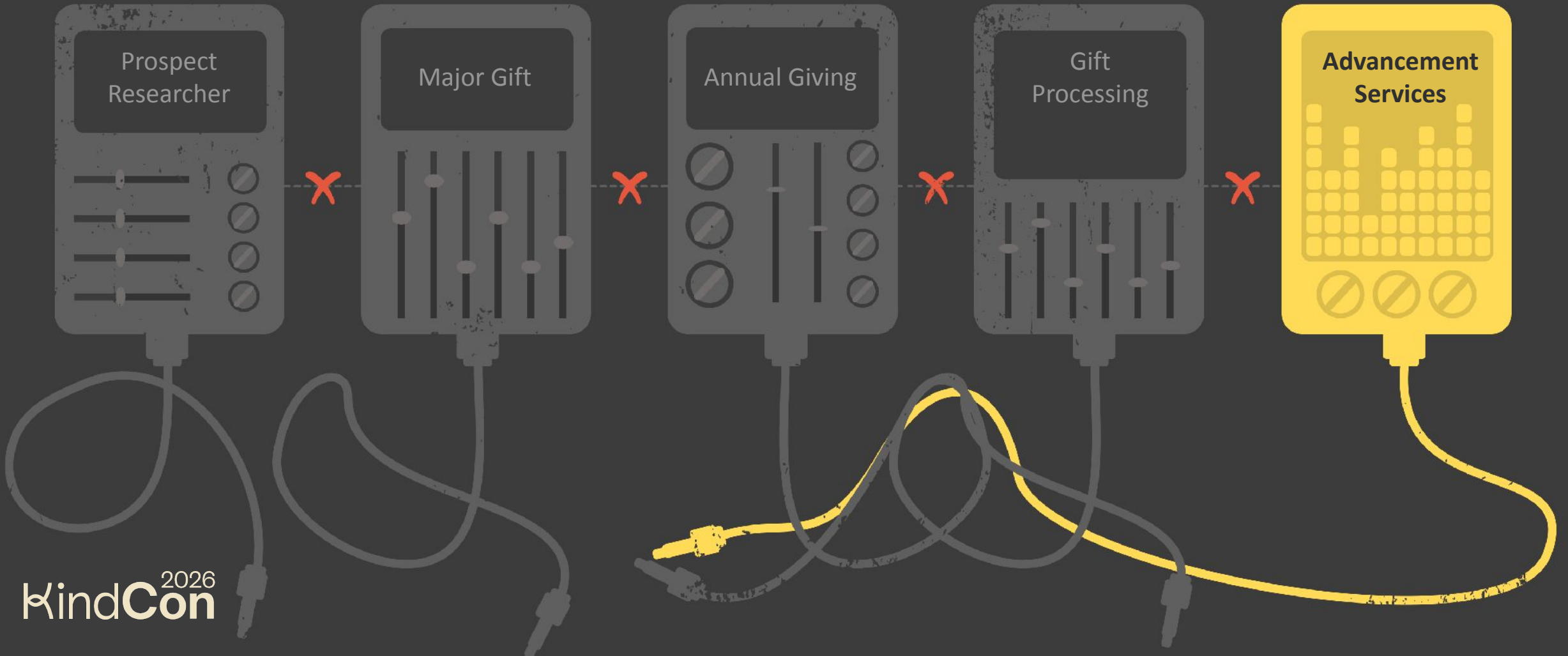
The Fundraising **Discord** Inside Most Organizations Today



The Fundraising **Discord** Inside Most Organizations Today



The Fundraising **Discord** Inside Most Organizations Today



One Donor Journey

One Harmonious Product Suite

Identification

Qualification

Cultivation

Solicitation

Stewardship



One Donor Journey

One Harmonious Product Suite

Identification

Qualification

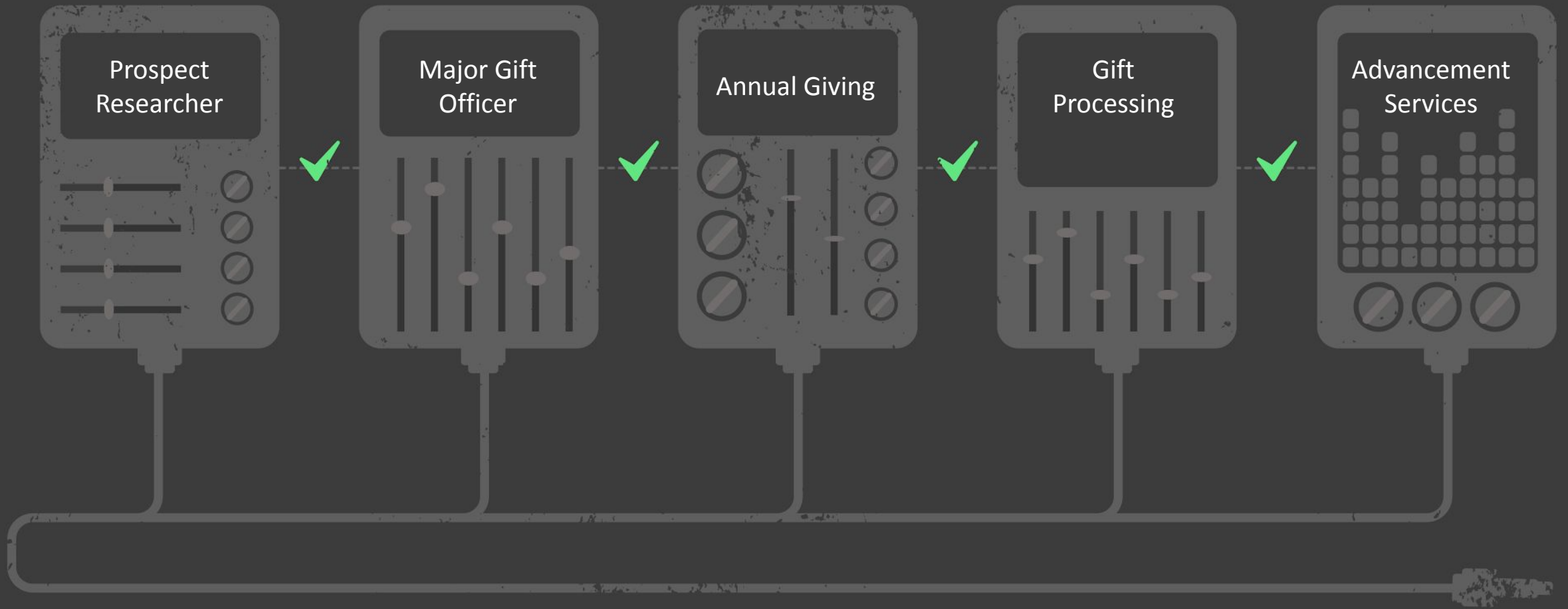
Cultivation

Solicitation

Stewardship



Built for the Way You Work



Agents Must Be Part of the *Human* Workflow



Agents Must Be Part of the *Human* Workflow



The background features a stylized illustration in a muted olive-green color. It depicts a person from the waist up, holding a guitar and playing it. Two large spotlights are positioned at the top corners, casting beams of light that converge towards the center, framing the person. At the bottom of the image, several hands are shown in various gestures, some pointing upwards, suggesting a crowd at a concert or event. The overall aesthetic is minimalist and artistic.

Each Product Continues to Evolve



Marianne Seiss

Chief Information Officer,
University of Wisconsin Foundation



Welcome to

KINDFEST

2026
KindCon

KindCon²⁰²⁶

Product Innovation



Now—Meet the **Band**





Mary Côté

Chief Technology Officer



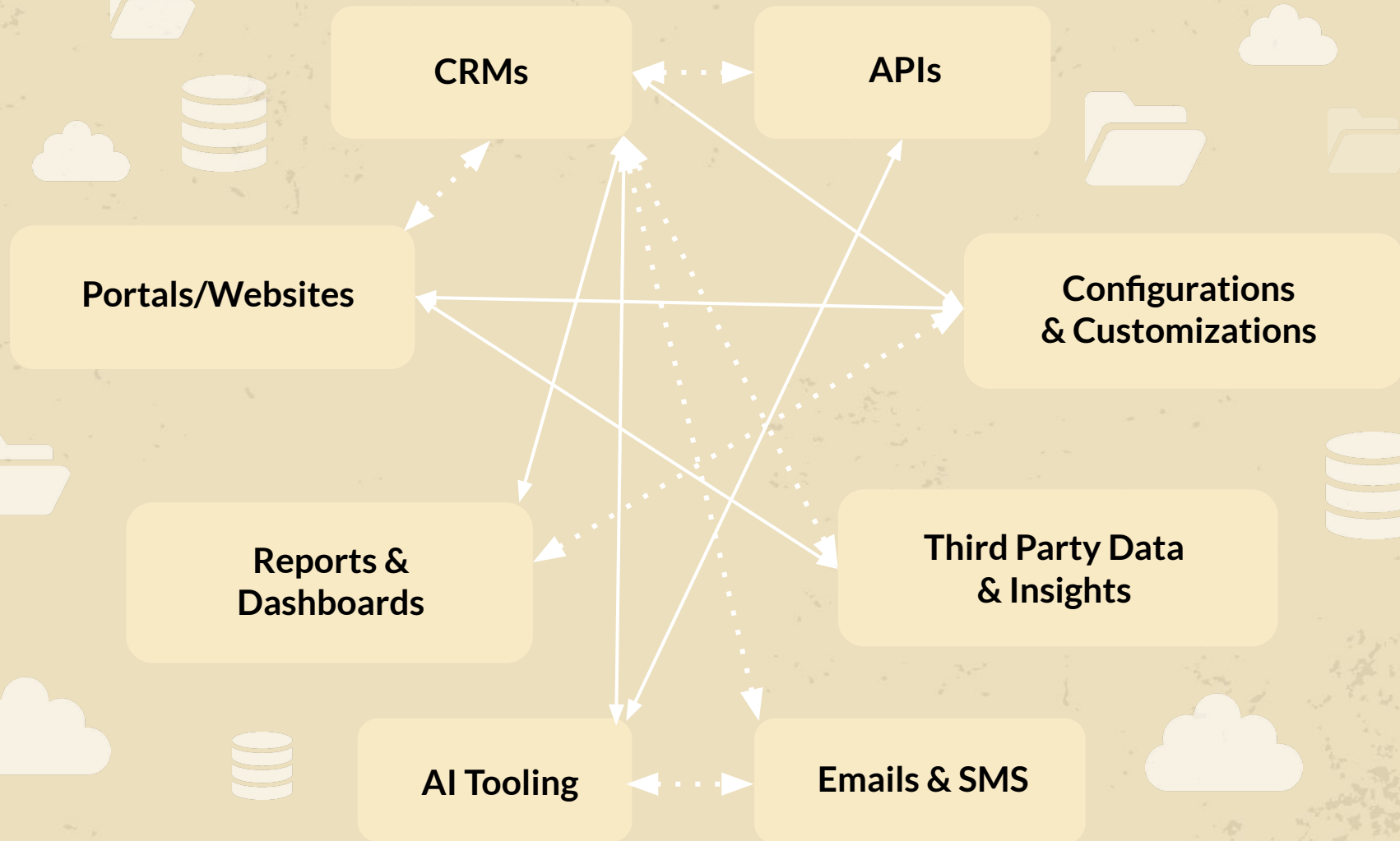


Mary Côté

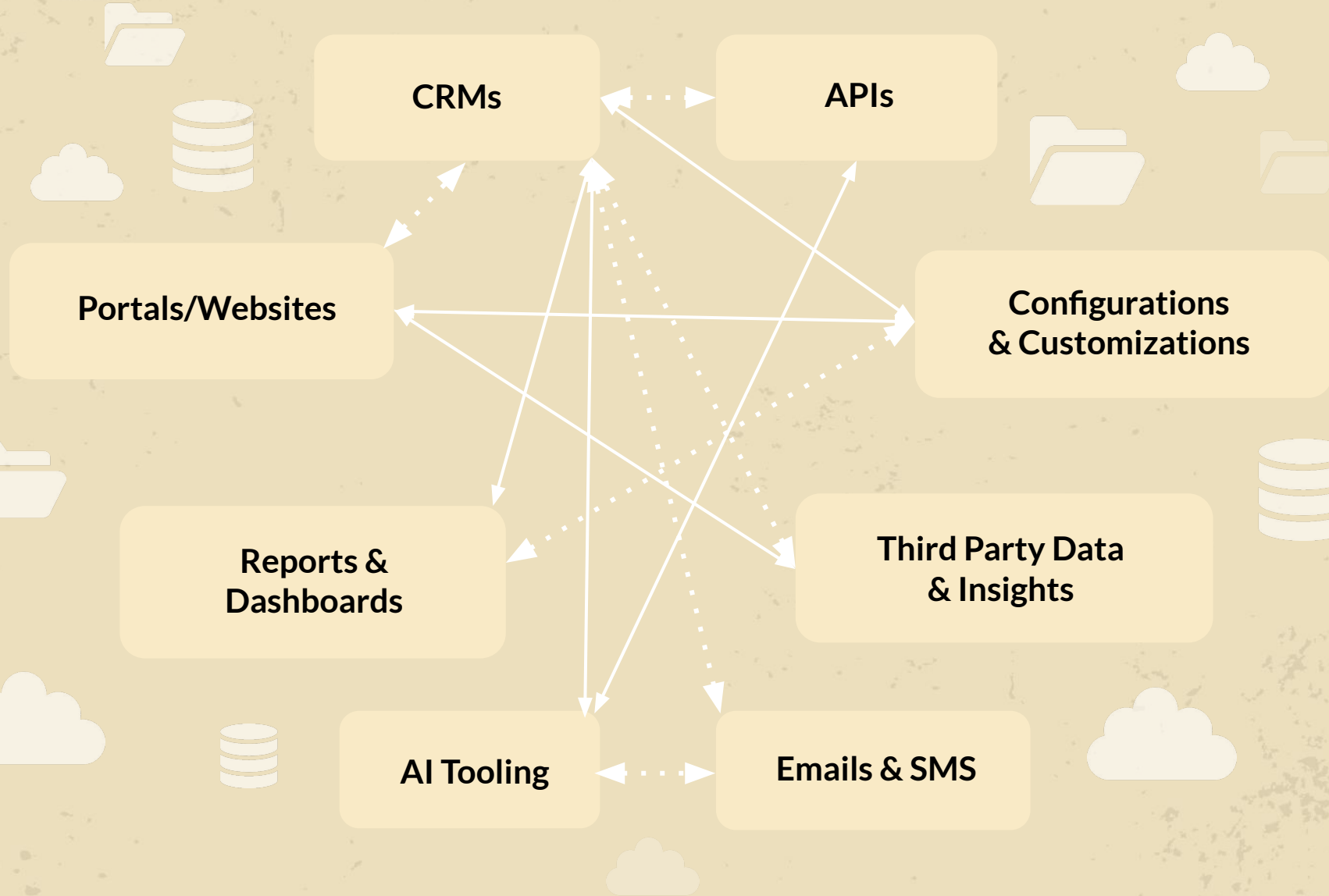
Chief Technology Officer



Data Architecture



Data Architecture



Data



Data →



Kindsight



Data → Insights





Prospect Research

Discover and qualify with
industry-leading data



Fundraising CRM

Manage relationships, gifts, data
+ integrations at scale



Constituent Portal

Online giving and donor engagement
integrated with your CRM



Prospect Research

Discover and qualify with
industry-leading data



Fundraising CRM

Manage relationships, gifts, data
+ integrations at scale



Constituent Portal

Online giving and donor engagement
integrated with your CRM

✦ Kindsight Intelligence

AI embedded directly into your fundraising workflows



Prospect Research

Discover and qualify with
industry-leading data



Fundraising CRM

Manage relationships, gifts, data
+ integrations at scale



Constituent Portal

Online giving and donor engagement
integrated with your CRM

✦ Kindsight Intelligence

AI embedded directly into your fundraising workflows



Technology Partner



Technology Partner



iWave

Prospect Research

Discover and qualify with
industry-leading data



Ascend



AdvancementRM

Fundraising CRM

Manage relationships, gifts, data
+ integrations at scale



Connect

Constituent Portal

Online giving and donor engagement
integrated with your CRM



Kindsight Intelligence

AI embedded directly into your fundraising workflows



Technology Partner



Technology Partner



Dan Basco

Senior Director of Product Management,
iWave + Data Intelligence





Identification

Qualification

Cultivation

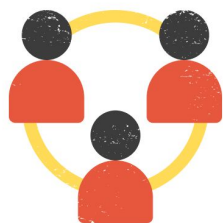
Solicitation

Stewardship

Prospect Research— Where Every **Great Ask** Begins

35 Years of Leading Donor Intelligence

Prospect Research and Wealth Screening



1.2B

Individual records



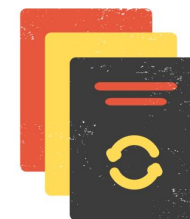
260M+

Institutional records



240M+

Gift records



44+

Premium data sources



4,500+

Nonprofits use it
every day

Available
Now

Appends

Create New Screening Project

Appends

Your organization has 5,000 appends available.

Data Cleansing



Address update (NCOA)



Standardization

Contact Information



Phone



Email



Date of Birth

Next



Integrated directly into iWave



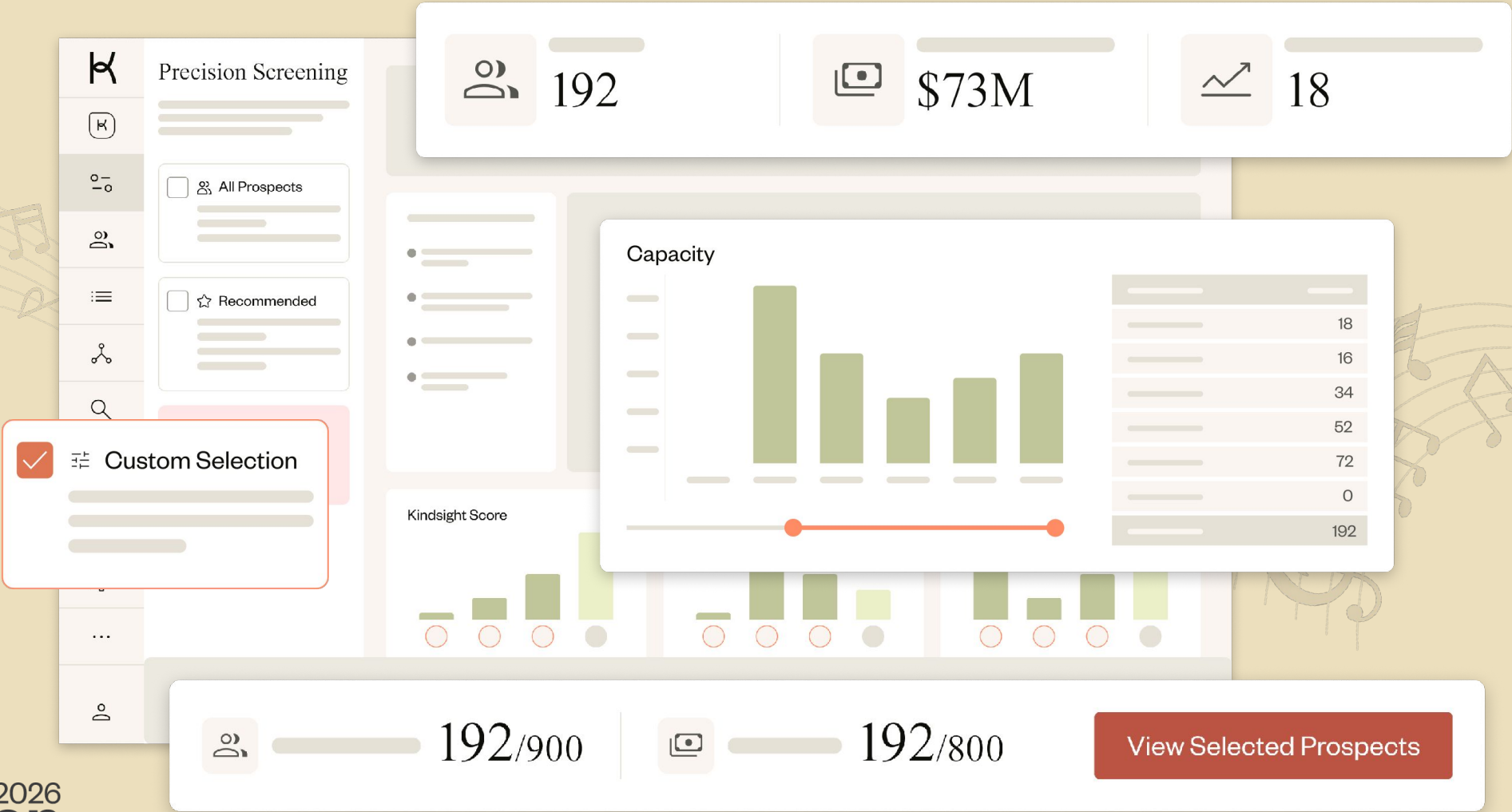
Excellent match rates



Improved

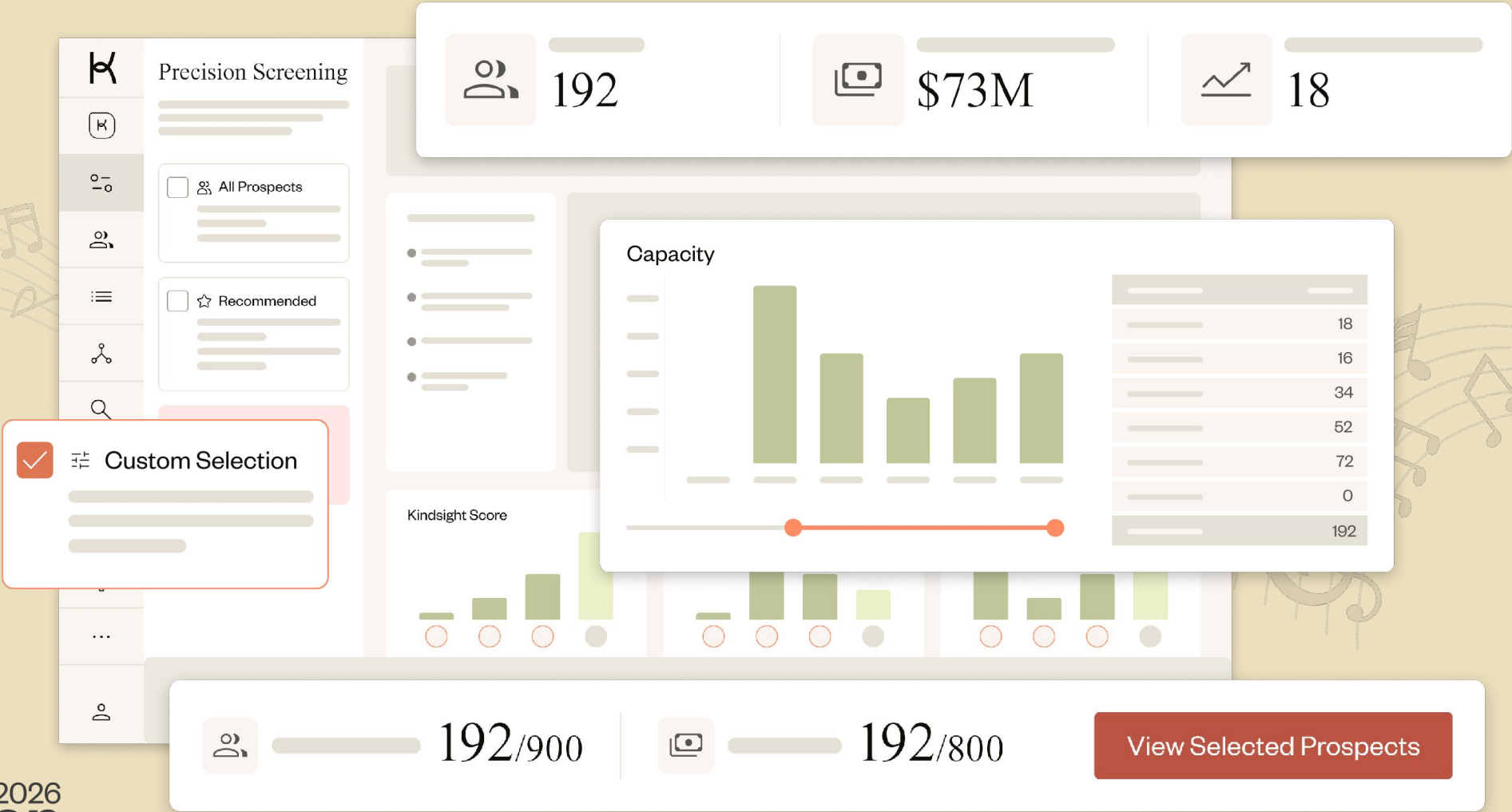
Available
Now *(Pilot)*

Precision Screening



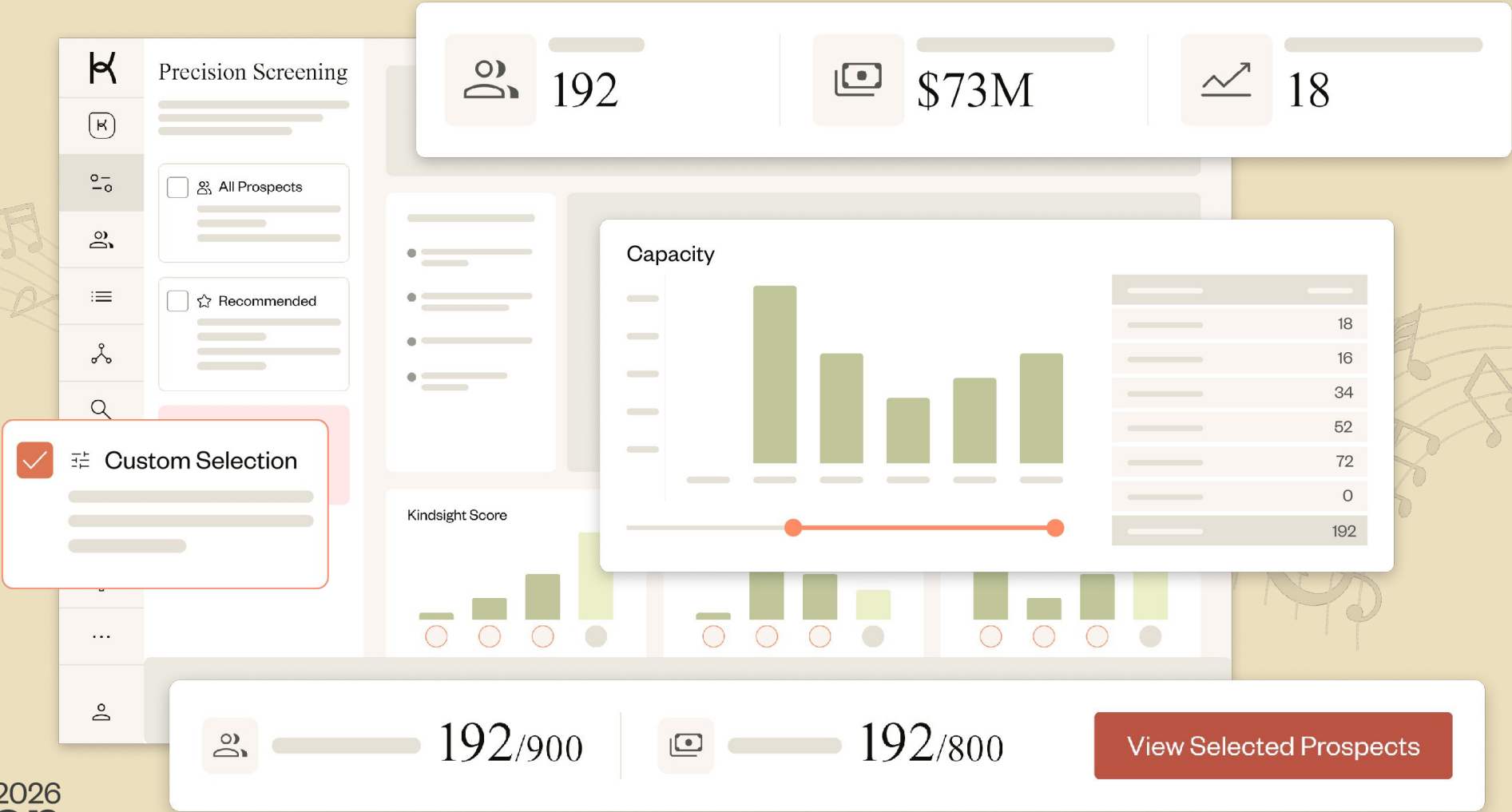
Available
Now *(Pilot)*

Precision Screening



Available
Now *(Pilot)*

Precision Screening





KI for iWave

AI Prospect Summary

4 Prediction Models

Screening Agent

AI Prospect Summary

AI Prospect Summary

Screening **Isn't** a One-Time Act

Leading Prospect Research organizations are
~5x more likely to do regular screening than
beginner-level research orgs.

5x



Available
Now *(Pilot)*

Screening Agent

2026



It Screens



It Profiles



It Flags



Your Best Donors Are Already
in Your Database. The Question
is **Who Finds Them First.**

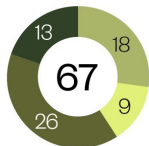


Predictive Models That See Who Should Be Next

ANALYTICS

Potential prospects
by capacity

< \$100K
\$100-500K
\$501K-1M
\$1M+

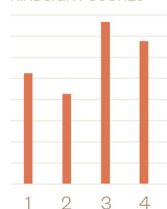


Gifts Dashboard

REFRESH

Notifications

KINDSIGHT SCORES



PROSPECTS BY CAPACITY



INSIGHTS

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

Tasks

☐	SUBJECT	NAME	DUE DATE
☐	Welcome Email	Ellen Gladstone	5/13/2025
☐	Planned Giving Prospect	John T Wilson	5/22/2025
☐	Donor	Lyndsay Rusch	5/27/2025

TASK

Generate new donor
welcome email

Use AI to Generate First Draft



Lyndsay Rusch

SCORE

ANALYTICS

MULTI-LENS

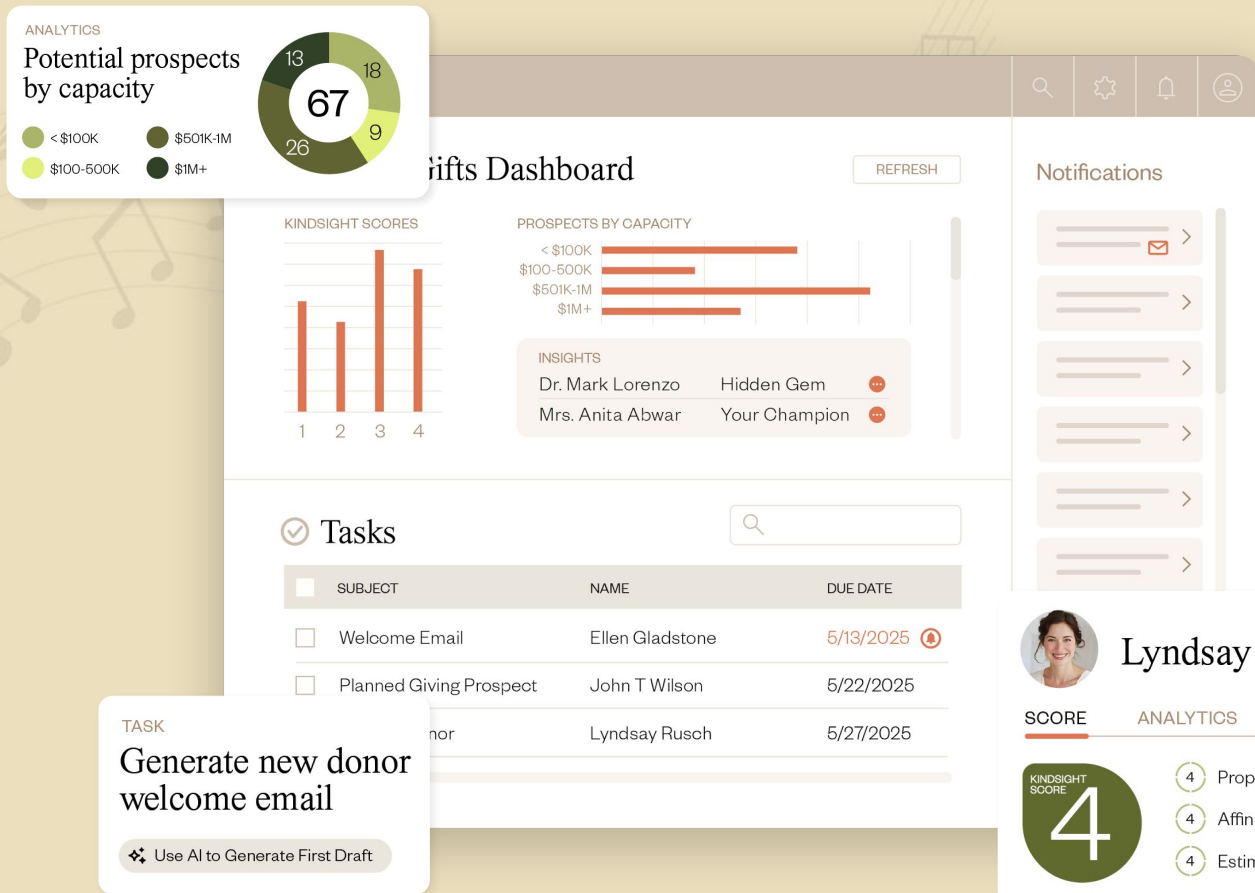


4 Propensity to Give
4 Affinity to Education
4 Estimated Capacity

Additional Details



Predictive Models That See Who Should Be Next



Major Gifts



Annual Giving

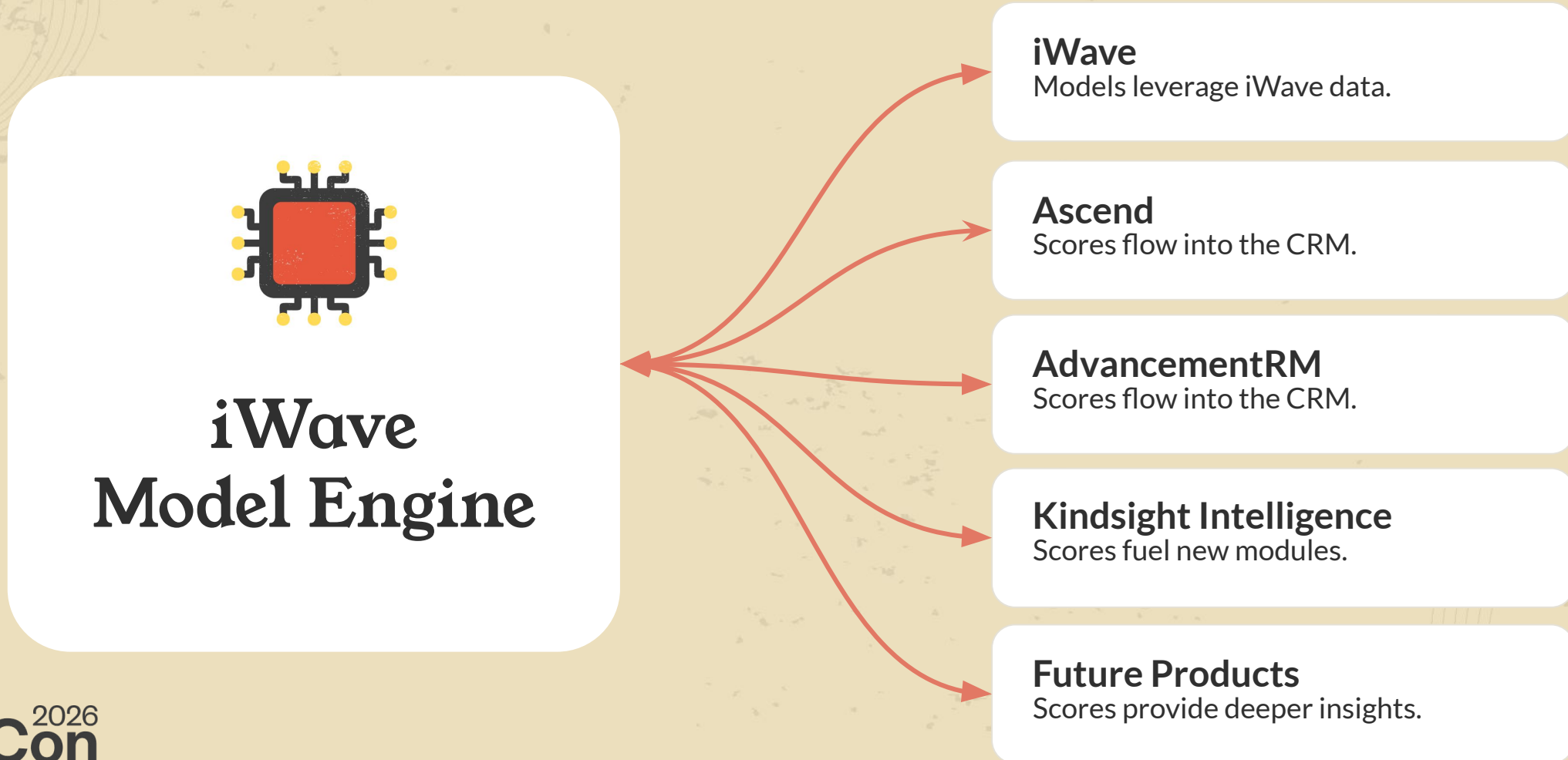


New Donor Acquisition



Grateful Patient

Fueling the Fundraising Enterprise





iWave in 2026



Available Now

Appends Enhancements

Precision Screening (Pilot)

Prospect Summary (Pilot)

Screening Agent (Pilot)

In Development

Grateful Patient
Enhancements

Predictive Models

Planned

Donor Discovery Agent

KI Assistant
—Ask Your Data



Meredith Mitchell

VP of Product Management—CRM





Ascend



AdvancementRM

Identification

Qualification

Cultivation

Solicitation

Stewardship

The CRMs That Keep **Everyone** on the Same Page

Shared Capabilities... More Harmony



Ascend



AdvancementRM

Shared—Built Once, Delivered to Both



iWave



Kindsight Intelligence



Connect



More...



Ascend

Identification

Qualification

Cultivation

Solicitation

Stewardship

Available
Now

Best Practices Brought Together



**Custom
Salutations**

Available
Now

Best Practices Brought Together



**Custom
Salutations**



**Gift
Receipting**

Available
Now

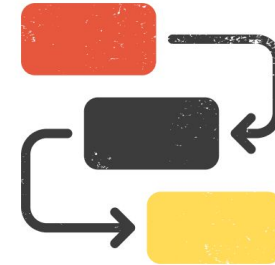
Best Practices Brought Together



**Custom
Salutations**



**Gift
Receipting**



**Prospect
Queue**

An orange, multi-lobed badge with the text "In Dev" in white.

Outlook and Gmail Integration

[illegible]



Outlook and Gmail Integration

[illegible]



Summary Definitions

Ascend

Constituent Details

Giving Details

Summaries

Summary Name	Summary Definition
S-0000112	First Gift/Pledge Payment Date
S-0000117	Current FY Total Giving
S-0000120	School of Business Giving - Cash
S-0000134	

Summary Definitions

Name	Description	Schedule	Active
Consecutive Years Given (FY)	Consecutive Years Given based on gifts and pledges. No soft credits included.	Daily	✓
			✓
			✓
			✓
			✓
			✓
			✓
			✓
			✓
			✓

Summary Definition Details

Active

Overview

Summary Definition Name

Description

Calculation

Calculation Object

Calculation Field

Calculation Type

Year Calculation Type

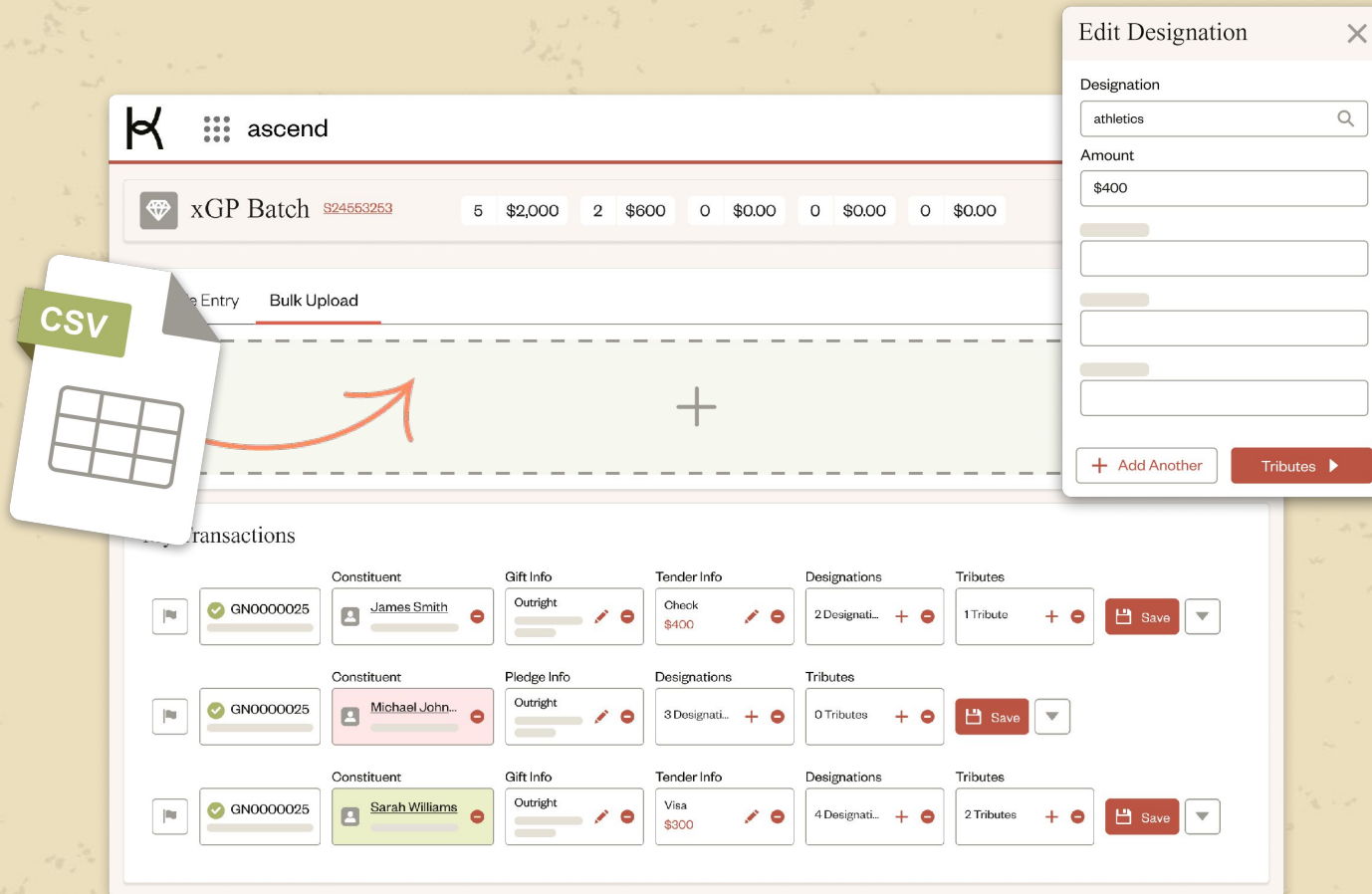
Filter

Schedule

Available
Now

xGP Batch

One UI for all gift transactions



The screenshot displays the xGP Batch interface. At the top, there's a header with the 'ascend' logo and a navigation bar. Below the header, a summary bar shows 'xGP Batch' with a unique ID 'S24553253' and a table of counts and amounts: 5 \$2,000, 2 \$600, 0 \$0.00, 0 \$0.00, 0 \$0.00. A 'CSV' icon with a grid pattern is overlaid on the left, with an arrow pointing to the 'Bulk Upload' tab. The main area shows a list of transactions with columns for Constituent, Gift Info, Tender Info, Designations, and Tributes. Three transactions are visible, each with a 'Save' button. An 'Edit Designation' modal is open on the right, showing a search bar for 'athletics' and an amount of '\$400'.

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

From cash to complex

Common cash to complex stock gifts, plus adjustments—no separate screens.

Individual or bulk

Enter one gift or thousands: scan a QR remittance, import a CSV, or key by hand.

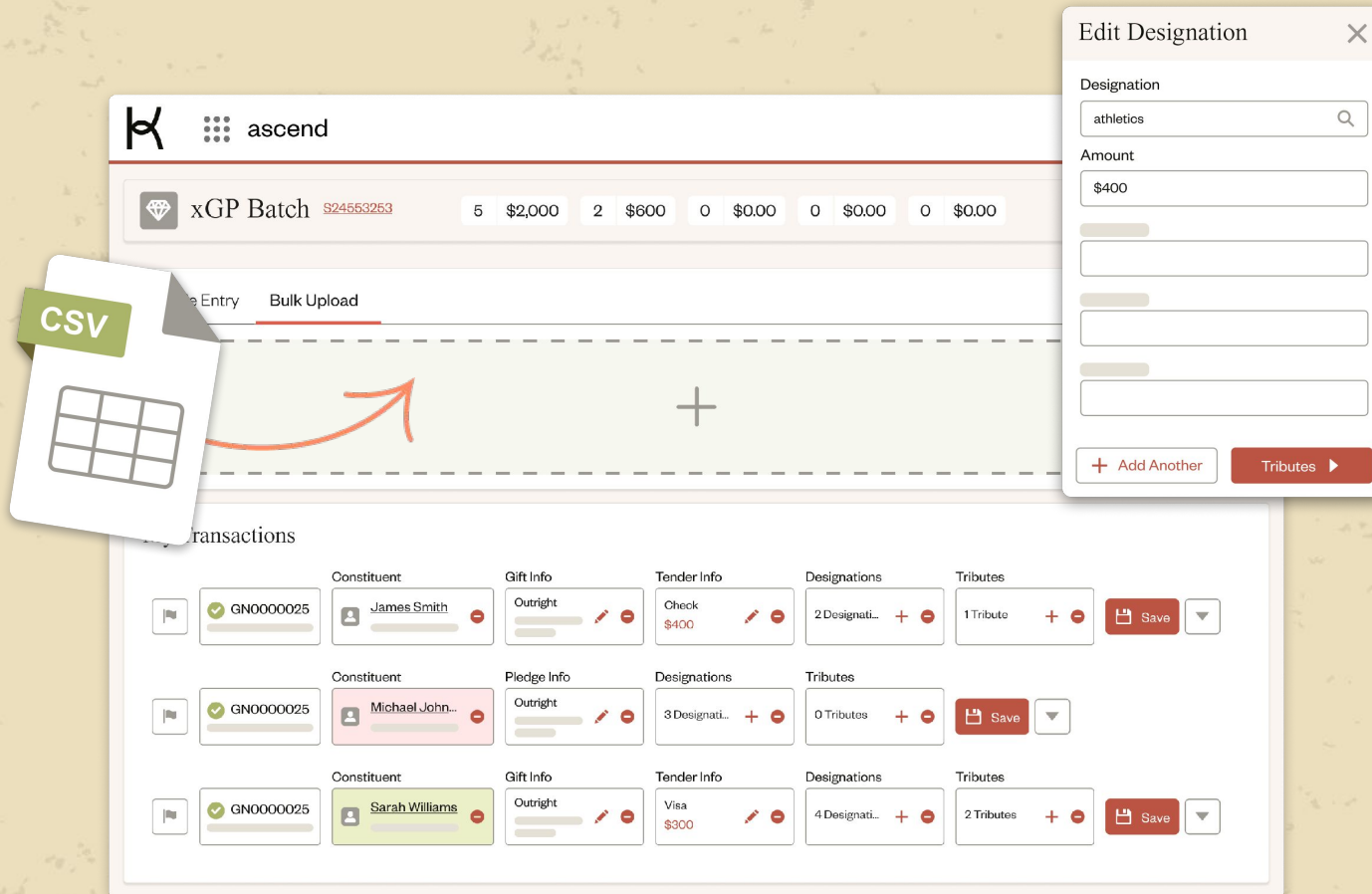
Batches run in the background

Keep entering while the last batch processes. No waiting.

Available
Now

xGP Batch

One UI for all gift transactions



The screenshot displays the xGP Batch interface. At the top, there's a header with the 'ascend' logo and a navigation bar. Below the header, a summary bar shows 'xGP Batch' with a unique ID 'S24553253' and a table of counts and amounts: 5 \$2,000, 2 \$600, 0 \$0.00, 0 \$0.00, 0 \$0.00. A 'CSV' icon with a grid pattern is overlaid on the left, with an arrow pointing to the 'Bulk Upload' tab. The main area shows a list of transactions with columns for Constituent, Gift Info, Tender Info, Designations, and Tributes. Three transactions are visible, each with a 'Save' button. An 'Edit Designation' modal is open on the right, showing a search bar for 'athletics' and an amount of '\$400'.

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

From cash to complex

Common cash to complex stock gifts, plus adjustments—no separate screens.

Individual or bulk

Enter one gift or thousands: scan a QR remittance, import a CSV, or key by hand.

Batches run in the background

Keep entering while the last batch processes. No waiting.



Kassandra Nojoprantoto

Philanthropic Services Manager,
Silicon Valley Community Foundation





Ascend Roadmap



Available Now

xGP Batch: Bulk Entry
Enhancement & Refinement

Custom Salutations

Gift Receipting

Prospect Queue



Ascend Roadmap



Available Now

xGP Batch: Bulk Entry
Enhancement & Refinement

Custom Salutations

Gift Receipting

Prospect Queue

In Development

Outlook & Gmail Integration
(Phase 1)

Giving Summary Definitions

Admin Permissions
Management

xGP Batch: Memberships &
Matching Gifts



Ascend Roadmap



Available Now

xGP Batch: Bulk Entry
Enhancement & Refinement

Custom Salutations

Gift Receipting

Prospect Queue

In Development

Outlook & Gmail Integration
(Phase 1)

Giving Summary Definitions

Admin Permissions
Management

xGP Batch: Memberships &
Matching Gifts

Planned

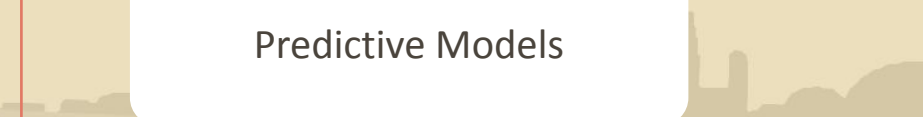


Membership Enhancements

xGP Batch Payment Gateway
& Adjustment Support

Predictive Models

Appends for Ascend





AdvancementRM

Identification

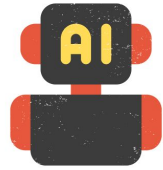
Qualification

Cultivation

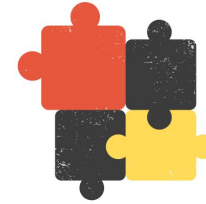
Solicitation

Stewardship

Major Launches for AdvRM in '2026



**KI for
AdvancementRM**



**Connect for
AdvancementRM**

Available
Now

Strategic Campaign Planner



AdvancementRM

Strategic Campaign Plan

Strategic Campaign Plan

	Planned Gifts	Planned Pledges	Current Number of Gifts	Current Number of Pledges	Planned Gift Amount			
	4	2	0	0	\$10,000,000			
	2	2	0	1	\$5,500,000			
	10	10	1	1	\$8,000,000			
	2	2	0	1	\$5,000,000			
	10	10	1	1	\$18,500,000			
	2	2	0	1	\$5,000,000			
	10	10	1	1	\$8,000,000			
	2	2	0	1	\$8,000,000			
	10	10	1	1	\$8,000,000			
	2	2	0	1	\$11,500,000			
	10	10	1	1	\$8,000,000			



Totals

Planned Total to Raise:	\$107,500,000
Current Total (Gift + Pledge):	\$2,500,000
Difference (Current - Planned):	-\$105,000,000

iWave for AdvancementRM

Kindsight



Maya Thornton

SCORE

ANALYTICS

Kindsight
Score

3

Estimated Capacity
\$2,867,315

Cultivation



Personalization

Engagement



Leadership

Giving Velocity



Accelerating

4

Propensity to Give

4

Affinity to Philanthropy (General)

4

Estimated Capacity to Give

3

Planned Giving Score

2

RFM Score

Capacity Score



4

Decreased by 1

Frequency Score



4

Increased by 3 (+7.5%)

Purpose Built for Enterprise Prospect Research

The screenshot displays the KindCon 2026 interface. At the top left is the logo 'K' followed by a grid icon. Below it is a navigation bar with 'Tasks' selected. The main content area shows a 'Tasks' table with columns 'Subject', 'Name', and 'Due Date'. Two tasks are listed: 'Send Gift Anniversary Email' for Rachel Lyons due 8/13/2026, and 'Send New Prospect Email' for Stefan Darnell due 8/13/2026. To the right of the tasks are two profile cards. The top card is for Stefan Darnell, showing a 'Kindsight Score' of 3 and three metrics: Prosperity to Give (3), Affinity to Education (4), and Estimated Capacity (3). The bottom card is for Ellen Gladstone, showing a 'Kindsight Score' of 4 and the same three metrics: Prosperity to Give (3), Affinity to Education (4), and Estimated Capacity (4). A 'Notifications' section is also visible on the right side of the interface.

Subject	Name	Due Date
Send Gift Anniversary Email	Rachel Lyons	8/13/2026
Send New Prospect Email	Stefan Darnell	8/13/2026

Stefan Darnell
SCORE ANALYTICS MULTI-LENS
Kindsight Score: 3
3 Prosperity to Give
4 Affinity to Education
3 Estimated Capacity

Ellen Gladstone
SCORE ANALYTICS MULTI-LENS
Kindsight Score: 4
3 Prosperity to Give
4 Affinity to Education
4 Estimated Capacity



Comprehensive Wealth Data



Automated Enrichment



Strategic, Unlimited Screening

Purpose Built for Enterprise Prospect Research

The screenshot displays the KindCon 2026 interface. At the top left is the logo 'K' followed by a grid icon. Below it is a navigation bar with 'Tasks' selected. The main content area is titled 'Tasks' and contains a table with the following data:

Subject	Name	Due Date
Send Gift Anniversary Email	Rachel Lyons	8/13/2026
Send New Prospect Email	Stefan Darnell	8/13/2026

Two profile cards are overlaid on the interface:

- Stefan Darnell**
SCORE ANALYTICS MULTI-LENS
Kindsight Score: 3
3 Prosperity to Give
4 Affinity to Education
3 Estimated Capacity
- Ellen Gladstone**
SCORE ANALYTICS MULTI-LENS
Kindsight Score: 4
3 Prosperity to Give
4 Affinity to Education
4 Estimated Capacity

A 'Notifications' section is visible on the right side of the interface.



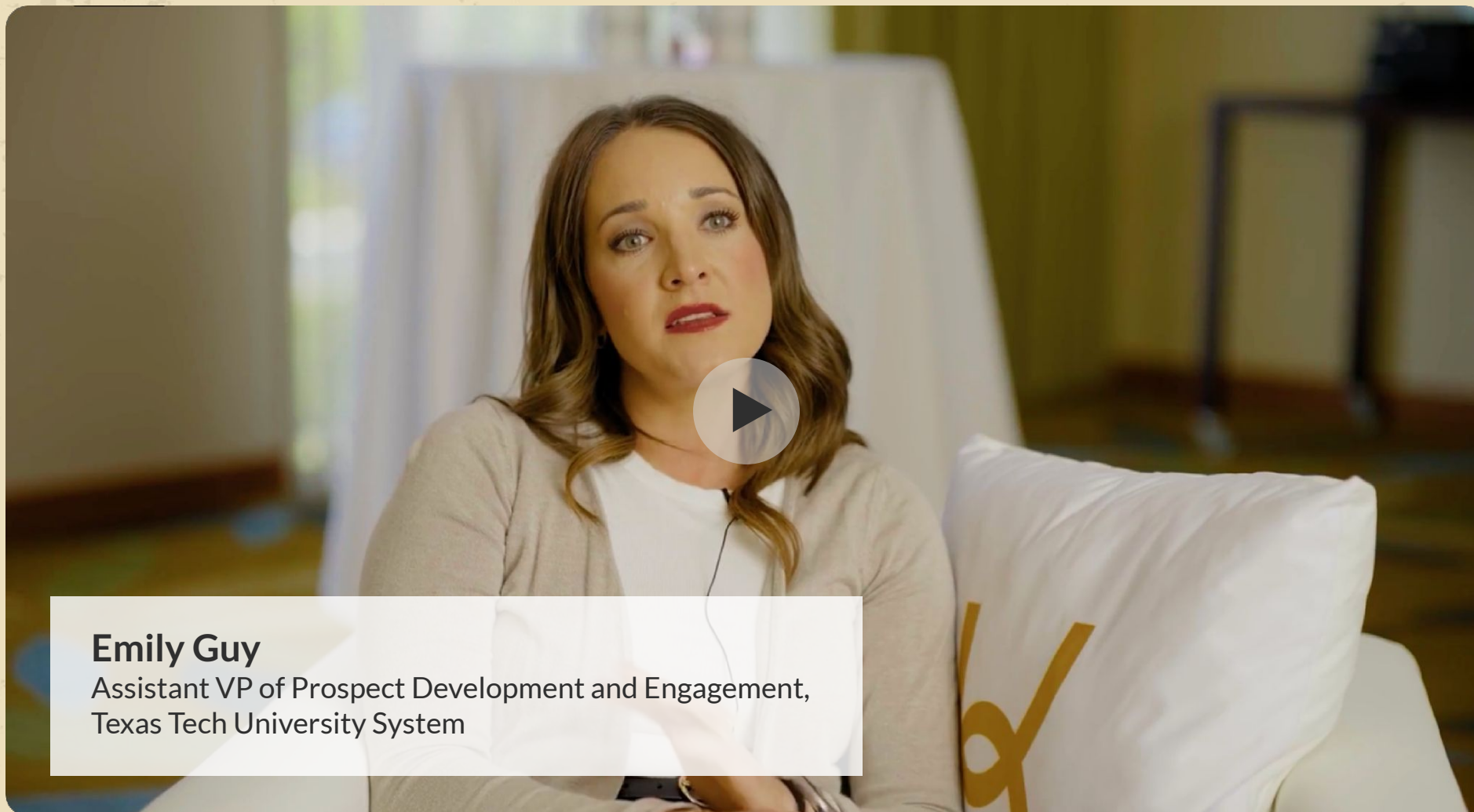
Comprehensive Wealth Data



Automated Enrichment



Strategic, Unlimited Screening



Emily Guy

Assistant VP of Prospect Development and Engagement,
Texas Tech University System



Welcome to

KINDFEST

KindCon²⁰²⁶



AdvancementRM Roadmap



Available Now

Kindsight Intelligence
Phase 2

CleanData+ Enhancements

Grateful Patient
Enhancements

SmartBatch: Do Not
Receipt DAF



AdvancementRM Roadmap



Available Now

Kindsight Intelligence
Phase 2

CleanData+ Enhancements

Grateful Patient
Enhancements

SmartBatch: Do Not
Receipt DAF

In Development

Kindsight Intelligence
Enhancements

iWave for AdvancementRM

SmartBatch Enhancements
—QCD & Fees in Pledge Payments

Custom Objects in Contact
Utilities

AdvancementRM Roadmap

Available Now

Kindsight Intelligence
Phase 2

CleanData+ Enhancements

Grateful Patient
Enhancements

SmartBatch: Do Not
Receipt DAF

In Development

Kindsight Intelligence
Enhancements

iWave for AdvancementRM

SmartBatch Enhancements
—QCD & Fees in Pledge Payments

Custom Objects in Contact
Utilities

Planned

Custom Giving Totals

Donor Challenge Match
Support

Predictive Models

Appends for
AdvancementRM



Identification

Qualification

Cultivation

Solicitation

Stewardship

Where Your Donors *Hear the Music*

KindCon²⁰²⁶

The Front-Stage Performance for Donors

Integrated Constituent Portal

 Ascend

 AdvancementRM

Connect

- Online Giving
- Donor History
- Directory
- Alumni Relations
- Membership
- Events
- Volunteering



Your Donor



Donor Cover

Giving ▾

Give

✓

✓

\$

\$ 166

\$ 166

✓

Cover processing fees\$14

Total Amount:\$ 514

Give with

Give with

General Admission\$10.00 × 1\$10.00

VIP Admission\$50.00 × 1\$50.00

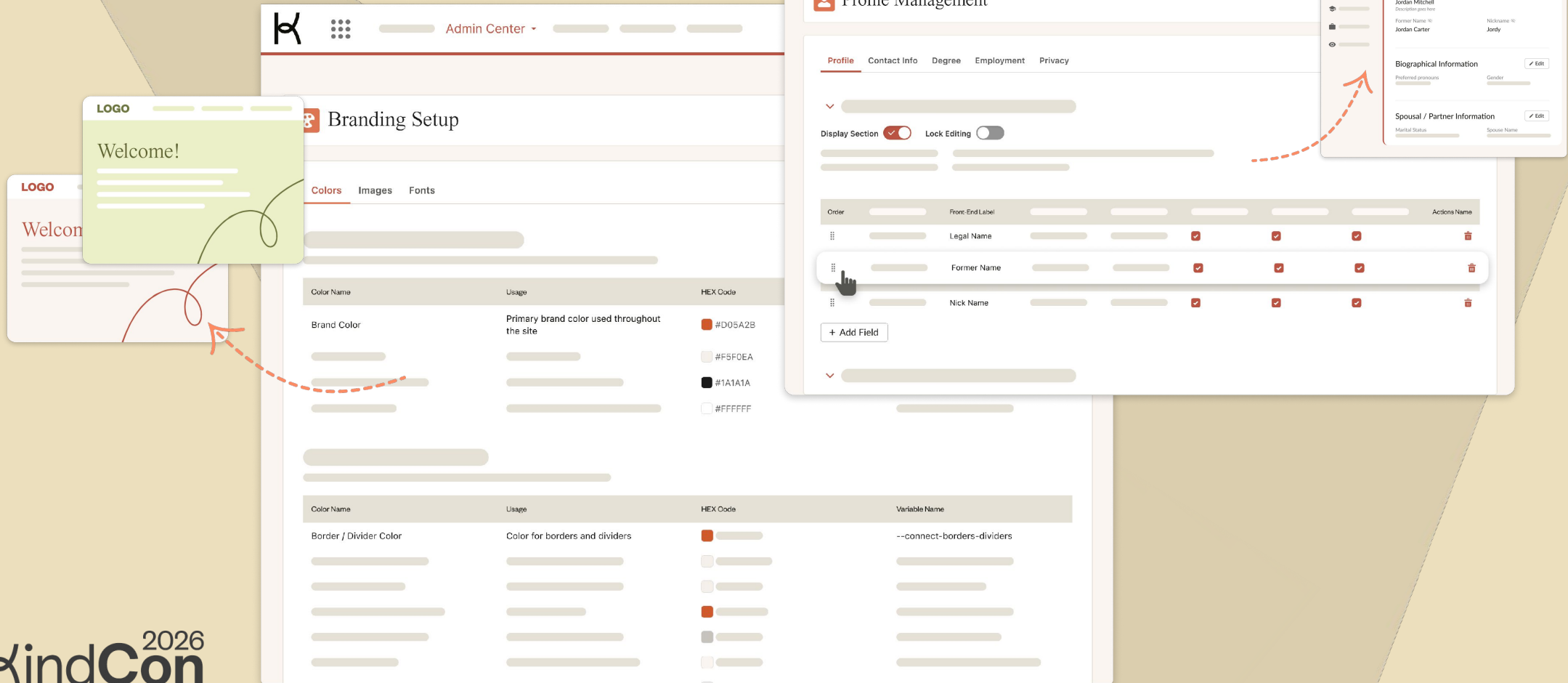
✓

Cover processing fees\$14

Total payment due: \$ 64.00

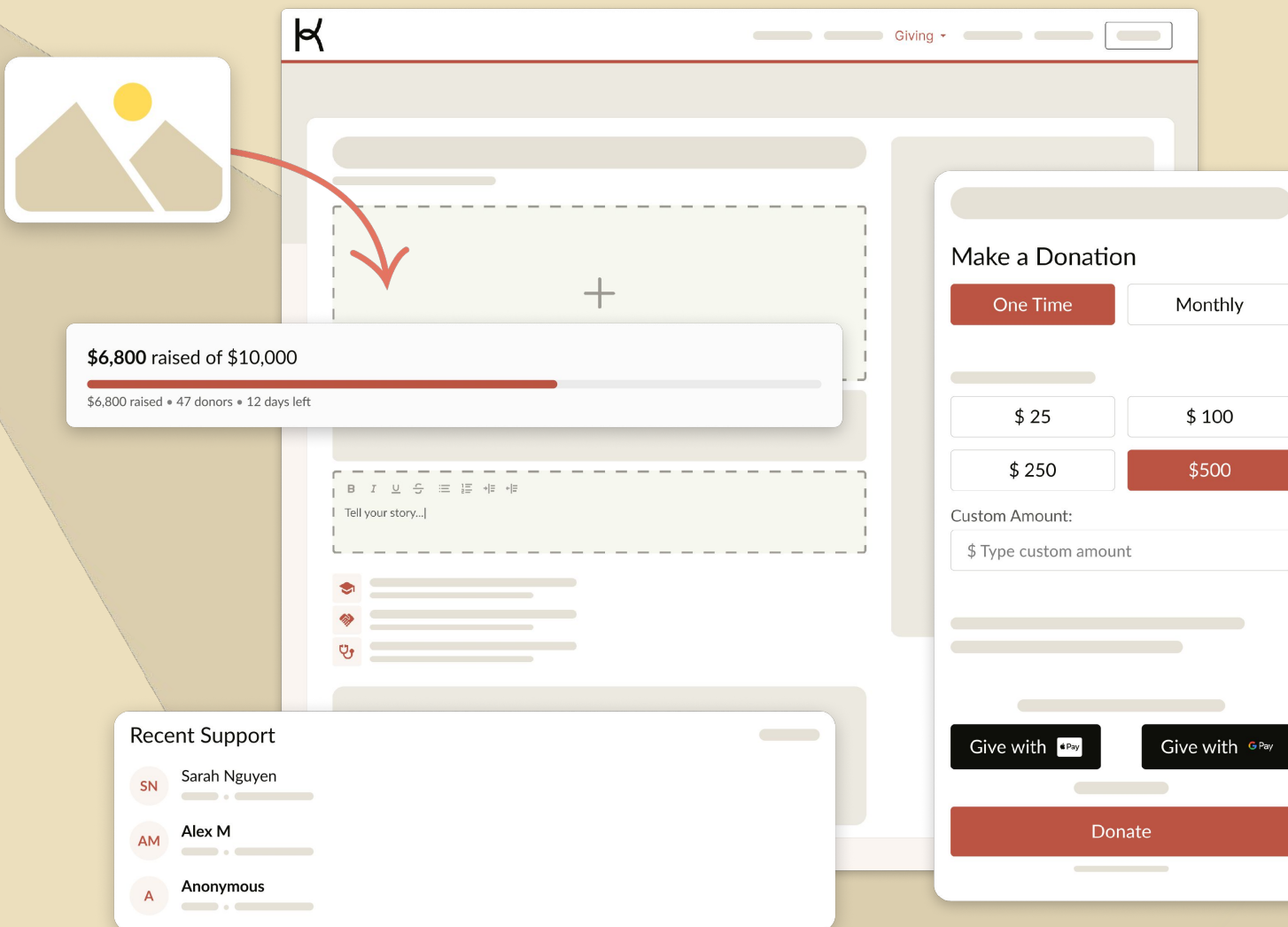
In Dev

Admin Center



In Dev

Peer-to-Peer Giving



The Connect Vision



Giving

Available Now

Online Giving Forms

Giving History & Receipts

Giving Societies

Memberships

Roadmap

Donor Cover

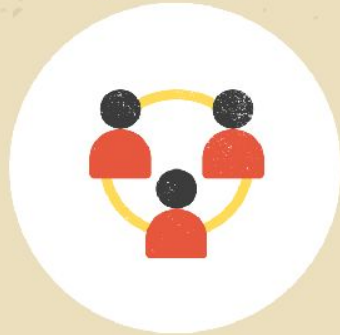
Optimized Giving Forms

Fundraising Campaigns

Giving Days

Donor Personalization

The Connect Vision



Engagement

Available Now

Events

Directory

Volunteer Management

Class Notes

News and Learnings

Roadmap

Mentorship

Boards & Committees

Clubs & Groups

The Connect Vision



KindCon²⁰²⁶

Stewardship

Available Now

Donor Stories

Roadmap

Email & SMS Engagement

Interest Areas

Stewardship Surveys

Impact Reporting



Connect Roadmap



Available Now

Membership UI
Enhancements

Online Giving Forms

Giving History & Receipts

Giving Societies &
Memberships

In Development

Admin Center

Donor Cover

Anonymous Giving

Planned

Campaign Fundraising Pages

Personalized Peer
Giving Pages

Giving Days

Fundraising Events w/ P2P





Identification

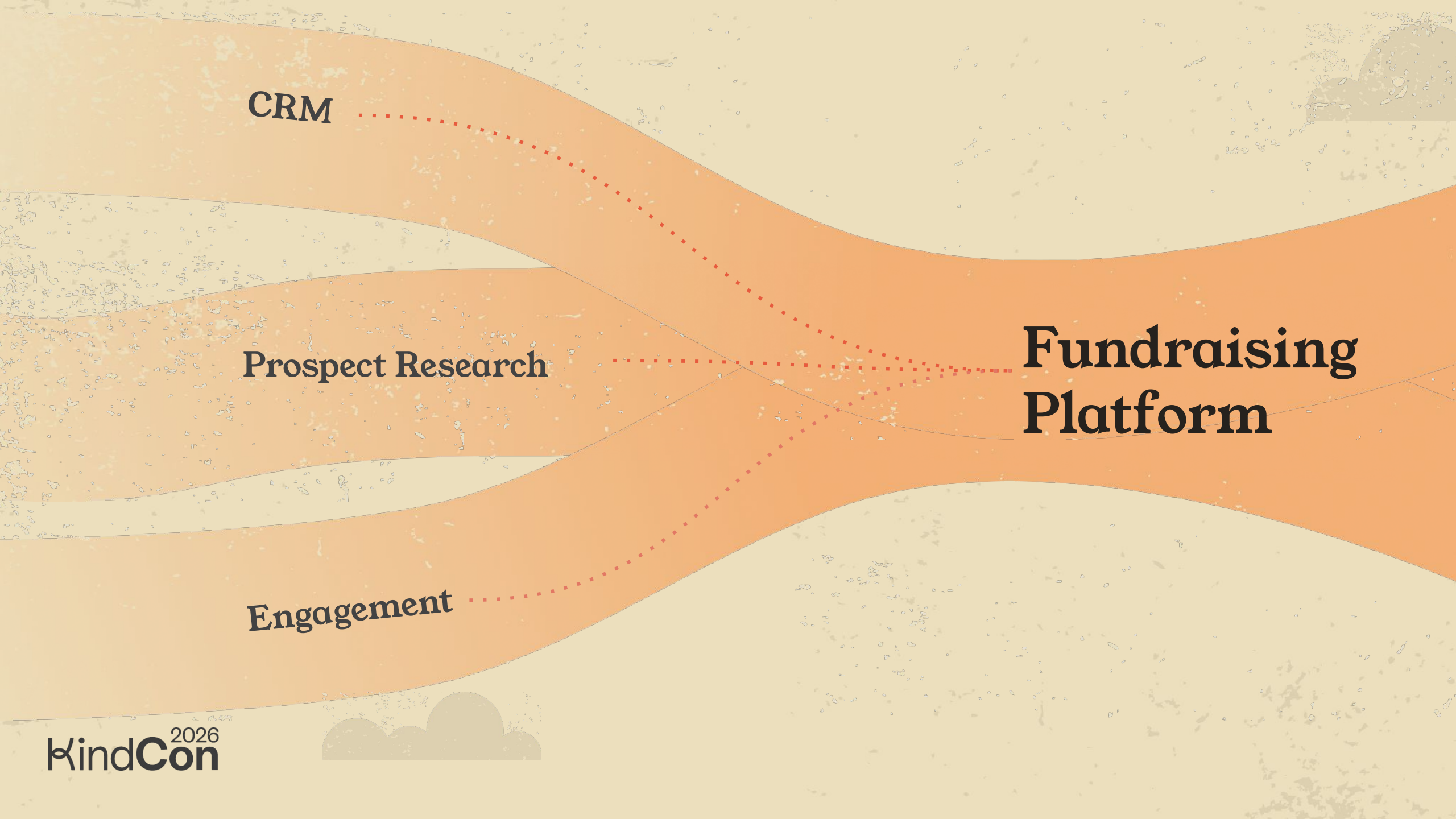
Qualification

Cultivation

Solicitation

Stewardship

Fundraising Platform



CRM

Prospect Research

Engagement

**Fundraising
Platform**

The background is a solid light beige color. It is decorated with several speech bubbles and question marks. In the top left, a speech bubble contains a white tangled knot icon. To its right are two small, faint question marks. In the top right, a speech bubble contains a large white question mark. In the bottom left, a speech bubble contains a large white question mark. In the bottom right, a speech bubble contains a white tangled knot icon. In the center, the text 'We've Listened - We've Been Confusing' is written in a bold, black, serif font.

**We've Listened
–We've Been Confusing**

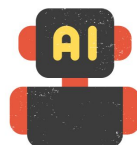
Let's Clarify

Today's 'Fundraising Platform' Package

Ascend CRM +



iWave for Ascend



AI-Based Donor Outreach
(Kindsight Intelligence)



Action Sequences

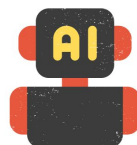
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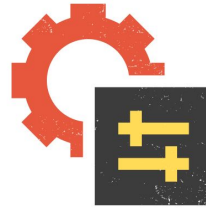


Action Sequences

Moving Forward



Describing this offering in
more plain language



Bringing more of this vision
to Advancement RM



Remaining our central vision
—and our goal is for everyone
to adopt it

What's Coming Next

01 Improved Mobile Experience

Gift officers get the full picture from the road—not just a shrunken desktop view.

02 Composite Scoring

Combine your institution research and scoring with iWave for a comprehensive evaluation you can act on.

03 Fundraiser Experience in Ascend

A workspace built around the fundraiser's day, not the database's structure.

KindCon²⁰²⁶

What's Brewing





- Pledge-to-payment lag
- Manual reconciliation
- Missed receipts



Kindsight Payments



- Pledge-to-payment lag
- Manual reconciliation
- Missed receipts



Kindsight Payments



- Limited performance visibility
- Custom report builds
- Complex 3rd party BI tools



Kindsight Analyze



- Pledge-to-payment lag
- Manual reconciliation
- Missed receipts



Kindsight Payments



- Limited performance visibility
- Custom report builds
- Complex 3rd party BI tools



Kindsight Analyze



- Donor/Fundholder Modern Self-Service
- DAF & Grantmaking Management
- Applicant & Grantee Engagement



Grantmaking + Scholarships

✦ Kindsight Intelligence

AI + Human Harmony



AI Is the Most *Consequential* Shift of Our Careers

Anthropic and OpenAI to
file for IPOs

US bans Mythos
frontier model

Economists
say AI isn't
linked to
productivity

What's Happening in AI

Agents hack external
systems



Only 10% of S&P 500
quantify AI impact

Anthropic and OpenAI to
file for IPOs

US bans Mythos
frontier model

Economists
say AI isn't
linked to
productivity

What's Happening in AI

Agents hack external
systems



Only 10% of S&P 500
quantify AI impact

What's Happening in Fundraising

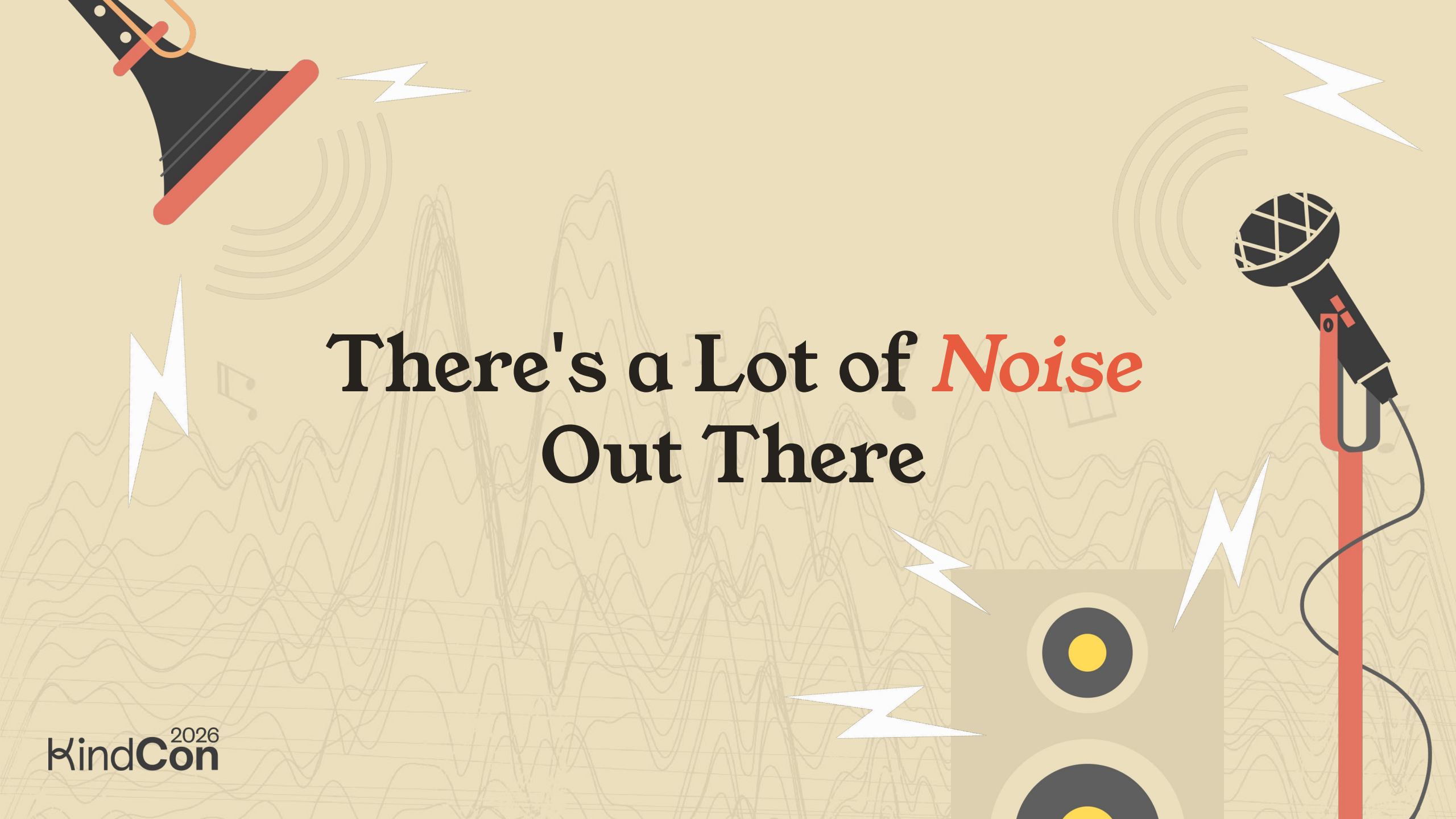
92%

Use AI in
some form

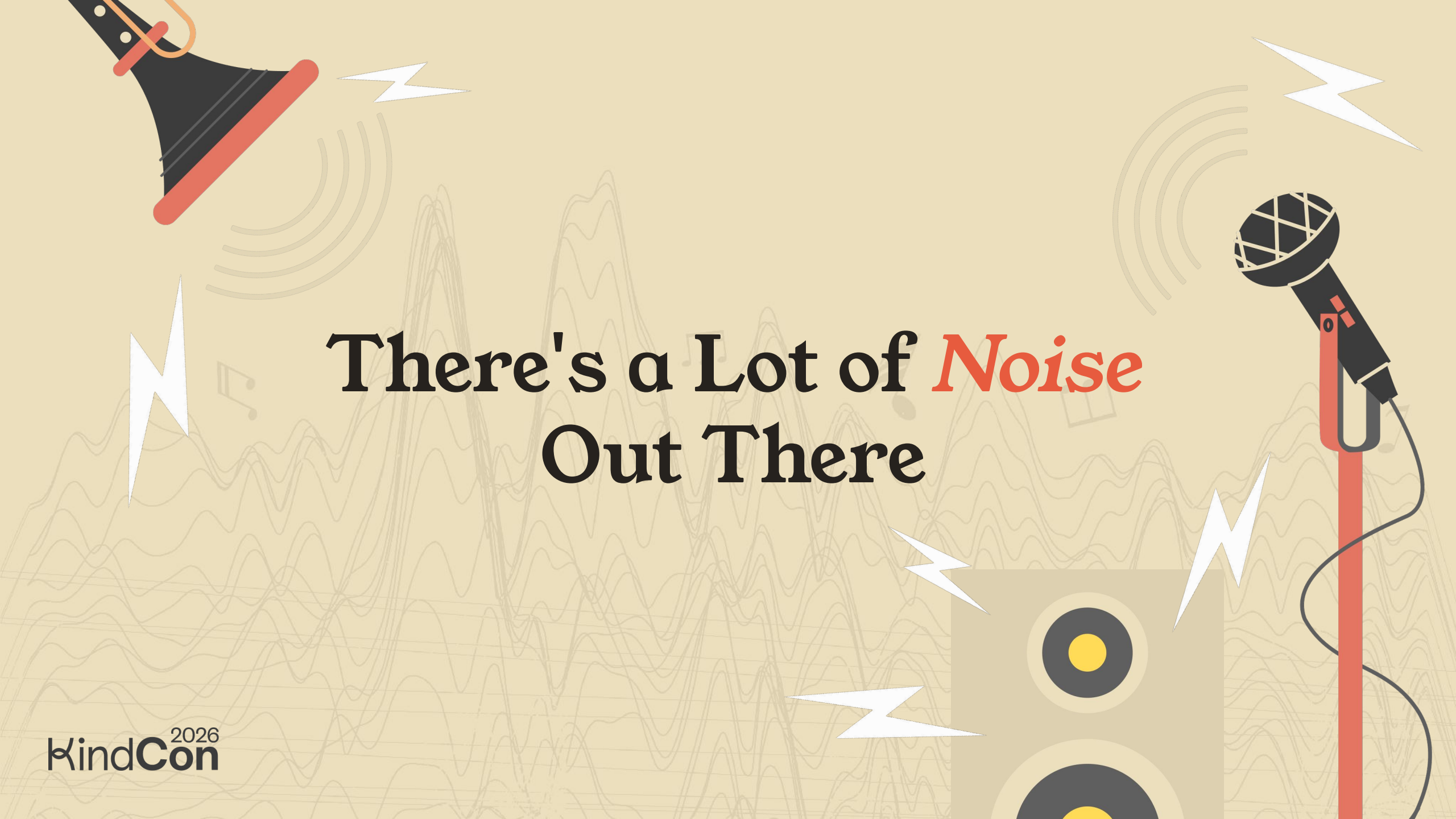
7%

Report that AI produced
clear/measurable
improvements





There's a Lot of *Noise*
Out There



There's a Lot of *Noise*
Out There

Where Can AI be Trusted in the Fundraising Experience?

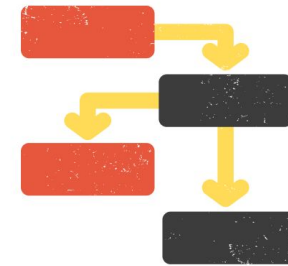
The Truth? It's Nuanced



**Not full
autonomy**



**Not always
“human-led”**



**Process
(and sometimes org)
specific**

NEW Fundraising Judgement Benchmark Report

> 300

Respondents (and growing)

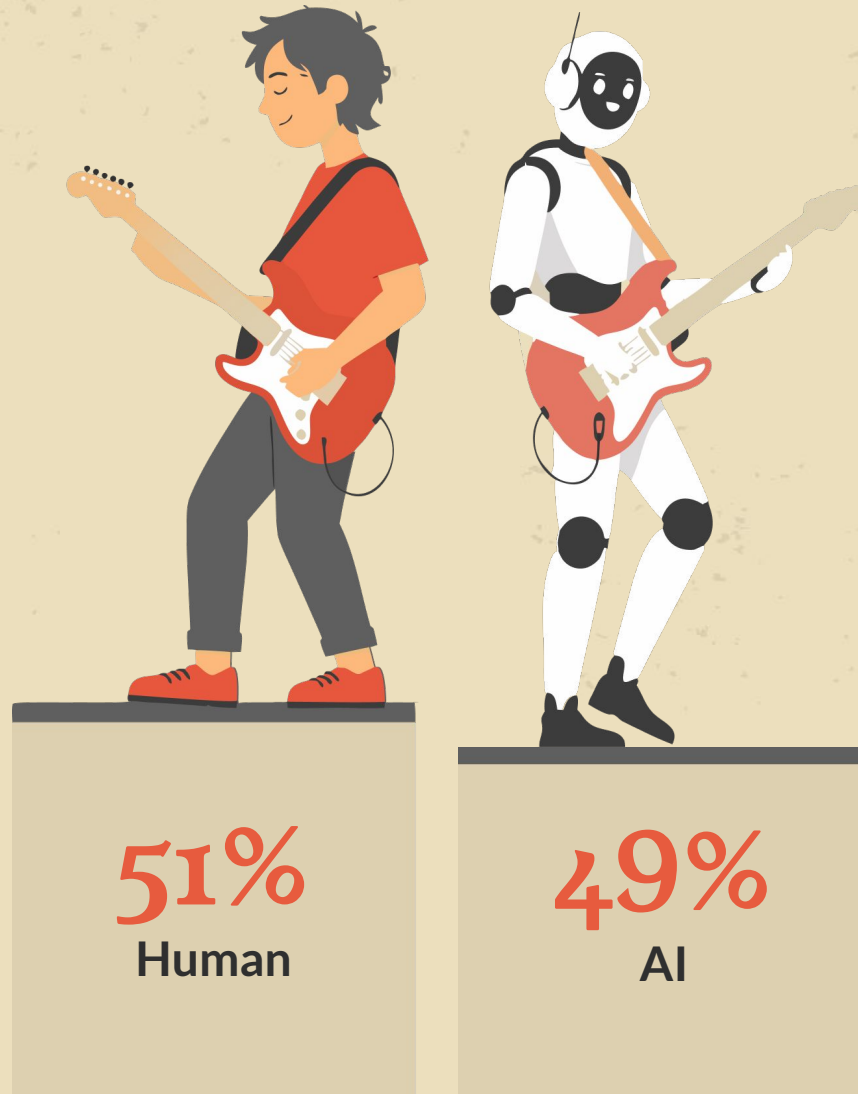
16

Fundraising Scenarios

Respondents selected their preferred response without
knowing if it was an AI or Human Expert

There Was No Clear 'Winner'

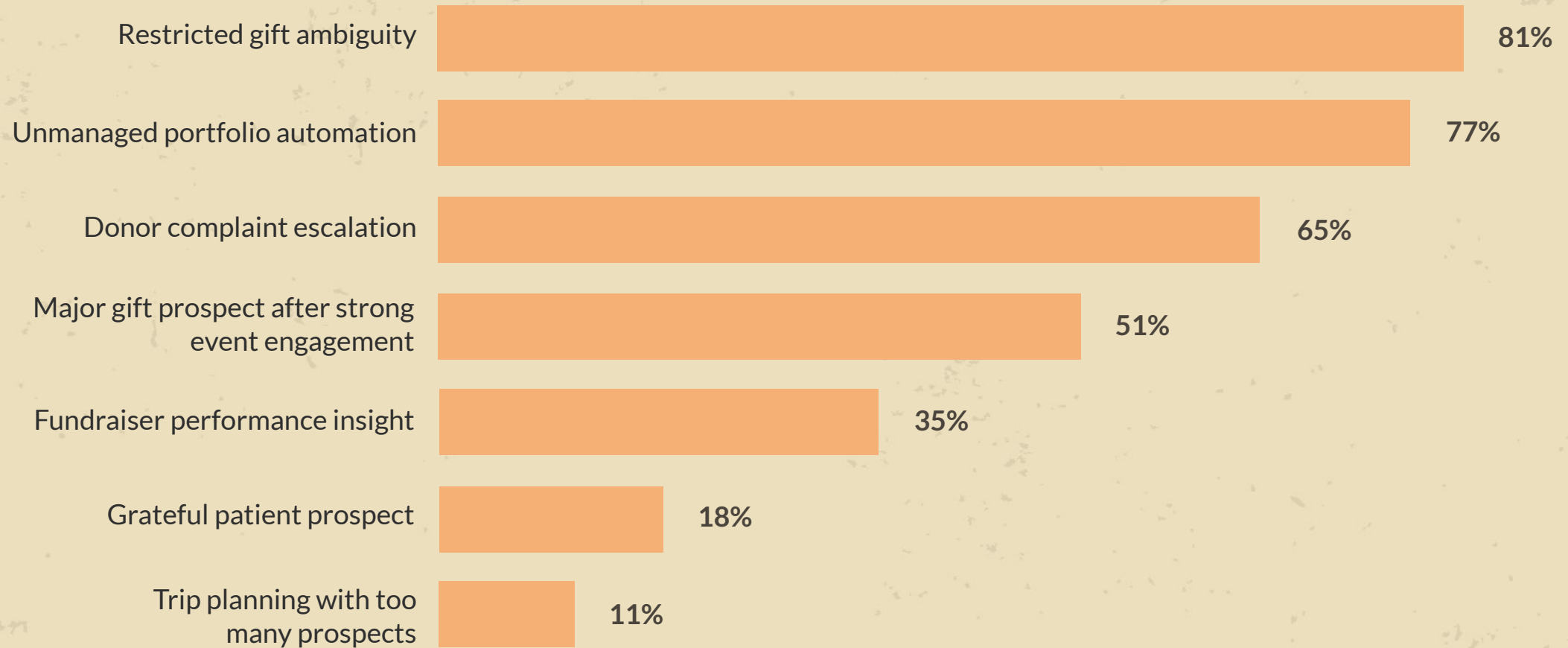
- ✓ Relationship
- ✓ Ambiguity
- ✓ High value



- ✓ Predictive
- ✓ Systematic
- ✓ High volume

Depends on the Task

% of respondents who preferred a human recommendation.



Humans Still Want Oversight

98%

Rejected ungoverned
execution



Humans Still Want Oversight

98%

Rejected ungoverned
execution



A network diagram consisting of several circular nodes, each containing a stylized person icon. These nodes are interconnected by thin, light-colored lines, forming a web-like structure that spans the top and bottom of the slide. The background is a dark, textured grey.

AI Agents Are Raising the Stakes

Our **Human-First** Agentic Principles



Purpose Built

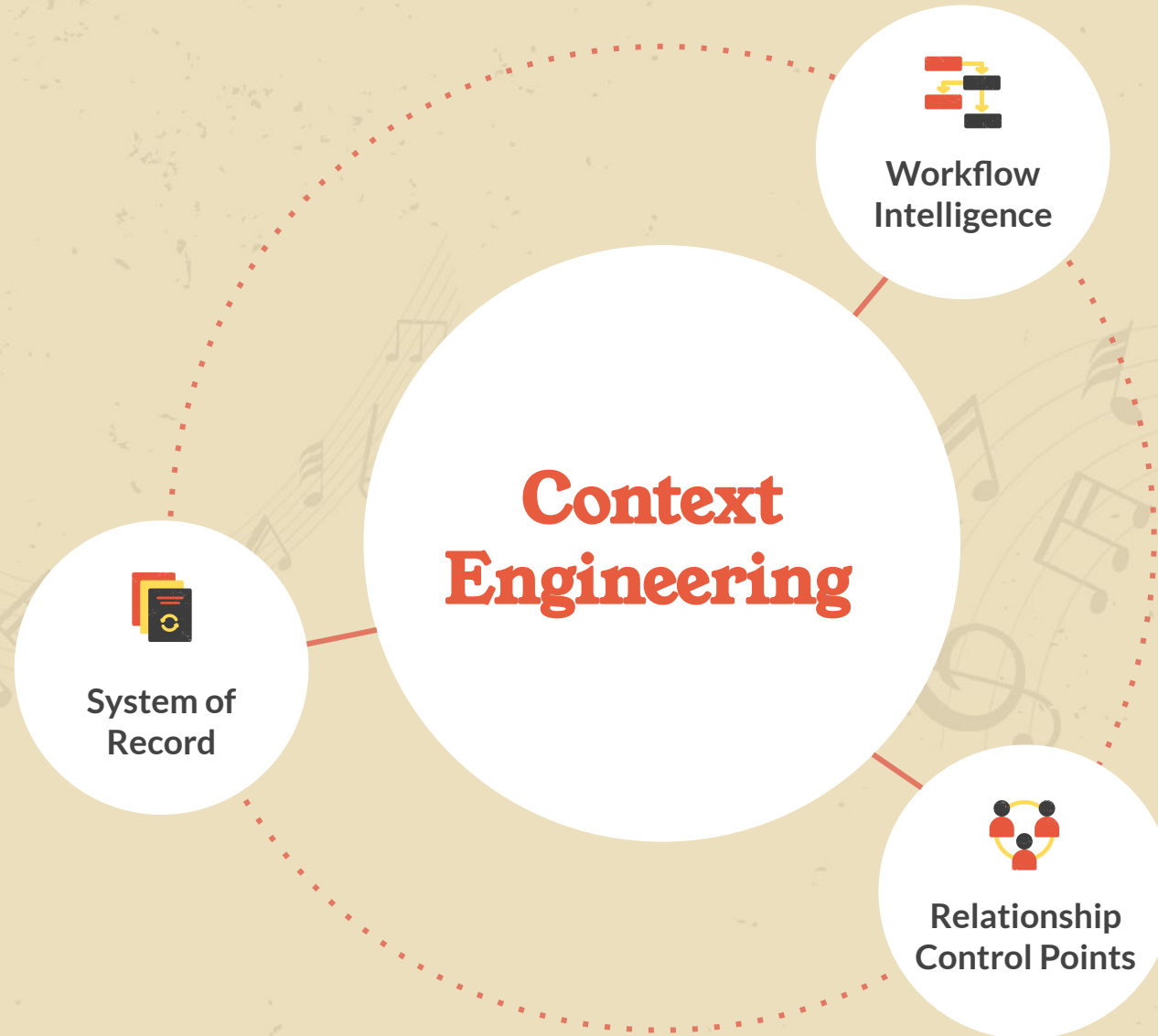


Configurable



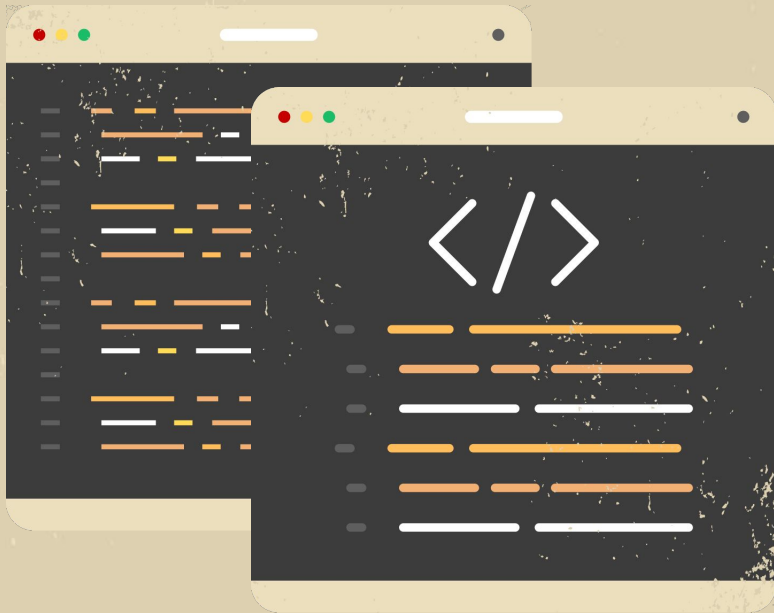
High Trust

Purpose Built



Configurable

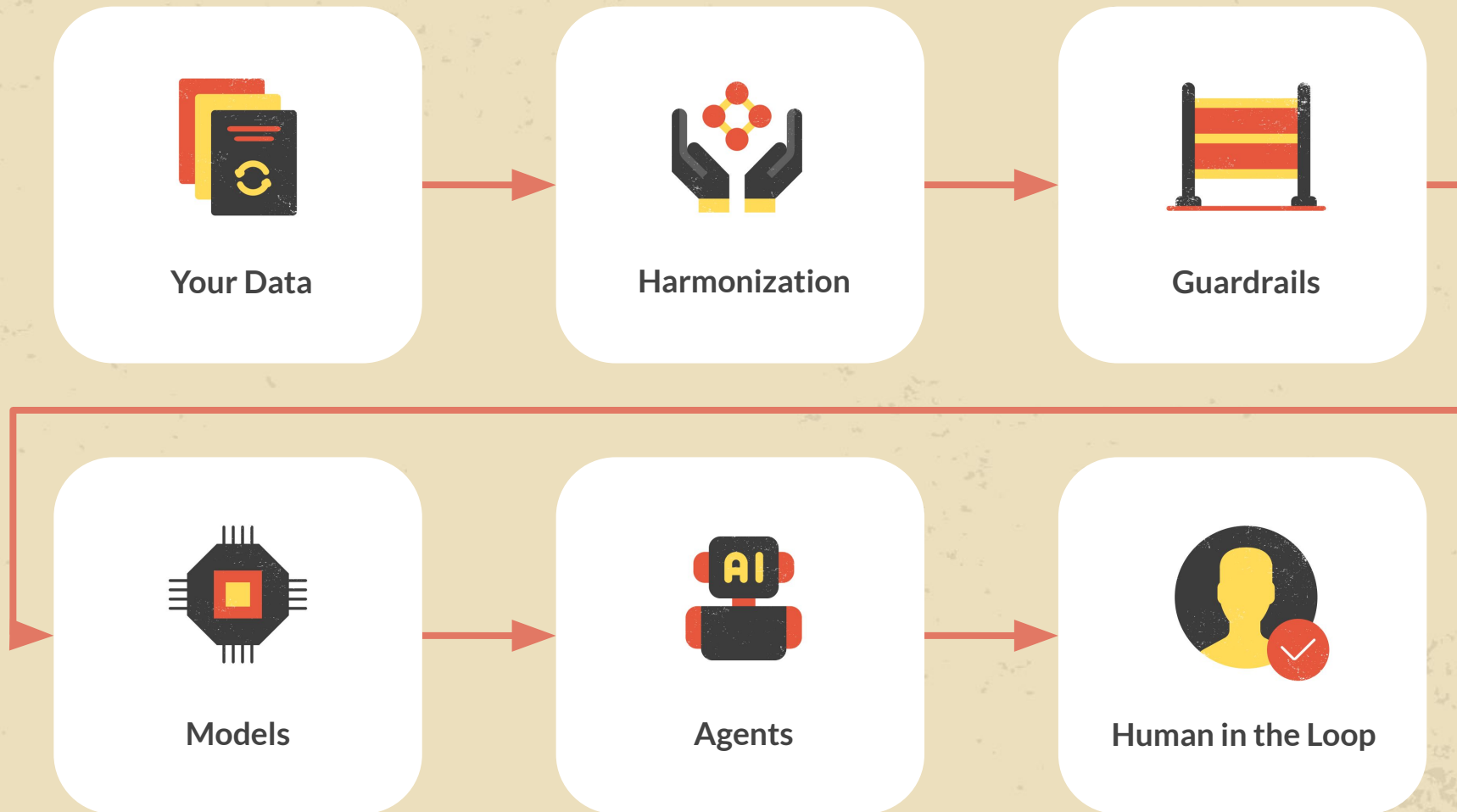
~~Custom Software Code~~



Adapt without IT Expertise



High Trust





✦✦ Kindsight Intelligence

Identification

Qualification

Cultivation

Solicitation

Stewardship

Your AI Fundraising Partner



KindCon²⁰²⁶



Kindsight Intelligence Today

The screenshot displays the Kindsight Intelligence interface with three overlapping panels. The background panel shows a donor profile for John Wilson, including a photo, name, account name (Wilson Household), and email. The middle panel shows a 'Contact Report' for John Wilson, generated on September 25, 2025, by Sally Green. It includes an executive summary and key areas of interest. The foreground panel shows a 'Gift History' report for John Wilson, stating that since his first gift in 2013, he has contributed a total of \$97,450, with his largest gift of \$13,000 made in April 2023. All reports are generated with Kindsight Intelligence.

ascend

John Wilson

Account Name
Wilson Household

Email

Contact Reports

Contact Report Intelligence

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

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

Regenerate Download as PDF Save

Report	Contact Method	Description	Date
Report 1	Email	Following up	July 1, 2024
Report 2			
Report 3			

Add Report with KI

KI Assistant Live

In-CRM chatbot for lookups, task automation, and best-practice answers grounded in your data.

KI Briefings Live

Donor briefings auto-generated before every scheduled meeting—wealth, history, recent engagement.

KI Contact Reports Live

Voice memo or rough notes in. Structured CRM-ready contact report out, with action items and follow-ups.

Personalized Outreach Live

Donor-specific email and letter drafts, grounded in the donor's history with your institution.

KI Impact Today



Mattie Snell

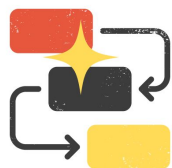
Director of Portfolio Strategy & Research,
Texas A&M Foundation

Welcome to

KINDFEST

KindCon²⁰²⁶





Trip Planning Agent

For MGOs—builds the visit plan: who to see, why now, and the brief for every meeting.



Engagement Agent

For AGOs & digital teams
—segments, campaigns,
and outreach that runs itself
to your standards.



Screening Agent

For prospect researchers
—continuous screening,
drafted profiles, flagged
wealth events.

Meet the Kindsight Intelligence Agents



Available
Now*

*for existing Fundraising Platform package customers

Trip Planning Agent



KI Trip Plan

New York — October 2026

Trip Start Date

10/13/2026

Trip End Date

10/16/2026

Trip Address

1120 Park Avenue

Trip Range

25

Trip Status

Locked In

Trip Details

Prospect Review & Selection

Outreach



Enter Trip Details

* Trip Description

New York — October 2026

* Address

1120 Park Avenue, New York, NY 10128

This location will be used as the center point for your trip planning radius.

Trip Context ⓘ

Meeting Margaret Ellsworth '81 about a leadership gift to the new engineering building. I'd like to see other alumni and parents in the area while I'm there.

This text will be used as context in KI-generated outreach emails.

Prospect List Size

30

* Start Date

10/13/2026



* End Date

10/16/2026



Distance Range (0-100mi)

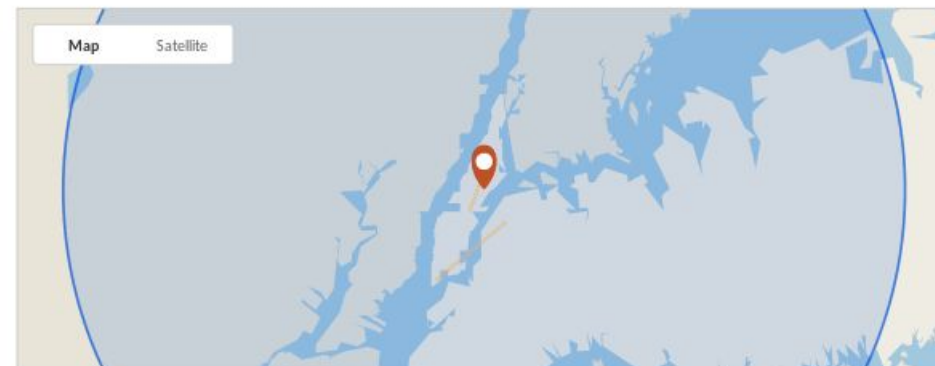
0-100



25

Map

Satellite



Cancel

Generate Prospect List

KI Trip Plan

New York — October 2026

Trip Start Date

10/13/2026

Trip End Date

10/16/2026

Trip Address

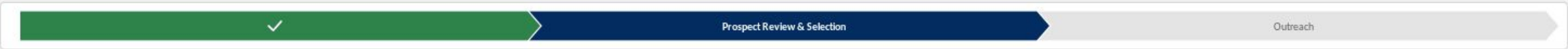
1120 Park Avenue

Trip Range

25

Trip Status

Locked In



Prospect Review & Selection

Q Search Prospects

Capacity

\$500K+

☒ My constituents

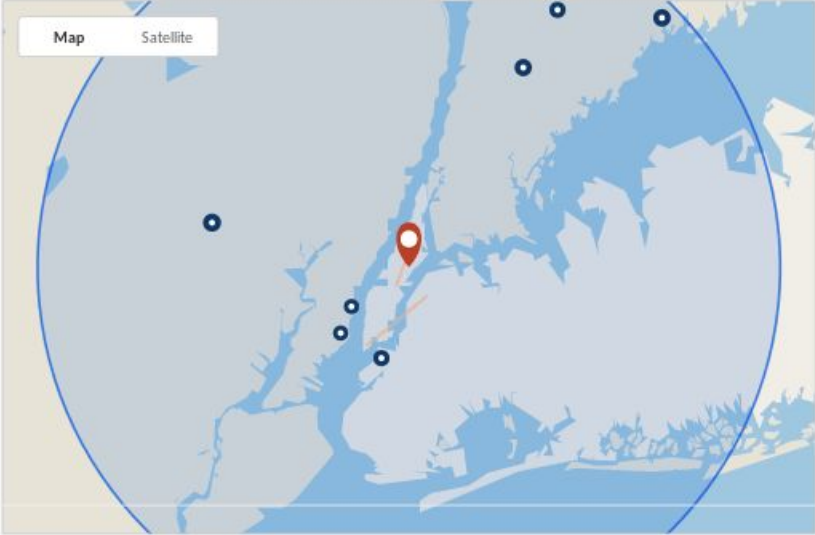
☐ Gave Last Year

Expand Map

	Name	Address	Distance	Capacity	Last Gift	Last Gift Date	PRM
1	🔒 Locked Christine Nakamura	Brooklyn, NY	4.2 mi	\$1.5M	\$100,000	03/14/2026	D. Reyes
2	🔒 Locked Daniel Osei	Hoboken, NJ	5.1 mi	\$2.2M	\$75,000	11/02/2025	D. Reyes
3	🔒 Locked Barbara Okonkwo	Jersey City, NJ	6.8 mi	\$900K	\$60,000	04/11/2026	D. Reyes
4	🔒 Locked Priya Raghunathan	White Plains, NY	18.7 mi	\$1.1M	\$45,000	01/22/2026	D. Reyes
5	🔒 Locked Elena Volkov	Greenwich, CT	21.4 mi	\$1.8M	\$120,000	03/09/2026	D. Reyes
6	🔒 New Thomas Beaumont	Montclair, NJ	14.2 mi	\$650K	\$25,000	09/18/2025	D. Reyes
7	🔒 New Alexandra Whitfield	Scarsdale, NY	19.6 mi	\$780K	\$32,000	02/04/2026	D. Reyes
8	🔒 New Michael Bergstrom	Stamford, CT	24.1 mi	\$540K	\$18,000	12/09/2025	D. Reyes

Showing 1 to 8 of 14 record(s)

Add 10 More Prospects



Lock This List

KI Trip Plan

New York — October 2026

Trip Start Date	Trip End Date	Trip Address	Trip Range	Trip Status
10/13/2026	10/16/2026	1120 Park Avenue	25	Locked In



Outreach Drafts (5 constituents selected)

5 total • 5 drafts generated

+

Generate Bulk Briefing

▼ Christine Nakamura

Brooklyn, NY • \$1.5M capacity

Draft

➤

Send

View Briefing

Generate KI Content

To: christine.nakamura@wexley.edu

Subject

In New York October 13-16 — may we meet?

Salesforce Sans13B I U S≡≡≡≡≡

Christine,

I'll be in New York October 13-16 meeting with alumni and friends of university, and I would welcome the opportunity to connect with you while I'm in town. The new engineering building has moved from drawings to a ground-breaking date in September, and given Nakamura Design Lab I thought you would want to hear it first.

> Daniel Osei

Hoboken, NJ • \$2.2M capacity

Draft

➤

Send

View Briefing

> Barbara Okonkwo

Jersey City, NJ • \$900K capacity

Draft

➤

Send

View Briefing

> Priya Raghunathan

White Plains, NY • \$1.1M capacity

Draft

➤

Send

View Briefing

> Elena Volkov

Greenwich, CT • \$1.8M capacity

Draft

➤

Send

View Briefing

Back

➤ Send All Emails



In Dev

for Ascend + AdvancementRM

Engagement Agent



Goals

Segments

Communications

Review

64

Filter contacts

KI Assistant

Add condition

Create segment

Name	Constituent Type	Last Gift Date	Lifetime Giving
Grace Bergstrom	Former Trustee	2025-03-14	\$4,912
Daniel Whitfield	Alumnus	2024-11-02	\$1,250
Thomas Ostrander	Former Trustee	2025-06-02	\$5,241
Alicia Moreno	Parent	2025-02-18	\$800
Priya Novak	Former Trustee	2025-01-27	\$3,878
Stephen Ruiz	Alumnus	2023-09-30	\$2,100
Michael Reyes	Former Trustee	2025-08-11	\$6,105
Karen Whitfield	Alumna	2025-04-06	\$1,400
Robert Nakamura	Friend	2024-07-22	\$650
Elaine Voss	Parent	2025-05-13	\$975
Marcus Webb	Alumnus	2024-12-01	\$3,300
Sofia Ramirez	Alumna	2025-03-29	\$1,850

Goals



Segments

Communications

Review



Goals



Segments

✓ Communications

Review

im	9:14 AM
ould we bump my monthly gift up t...	
Webb	Yesterday
uld be great. I'm usually free afte...	
sai	Yesterday
end the impact report before I rene...	
sei	Aug 11
give to scholarships.	
n	Aug 11
move me from text messages.	

Rachel Kim

Escalated

 Asked to increase her monthly gift and confirm employer matching



Available
Now*

*for existing iWave pilot customers

Screening Agent

 Create new screening project



Back

Next

☰ Create new screening project



Back

Next

 Create new screening project



Back

Next

Screening

< Back

Welcome to your screening results. Now that the screening is complete, let's review your setup and findings.

You configured this for new donor and prospect discovery, prioritizing Education prospects. We've filtered for a confidence threshold of 4.1 and a major gift size of \$10,000.

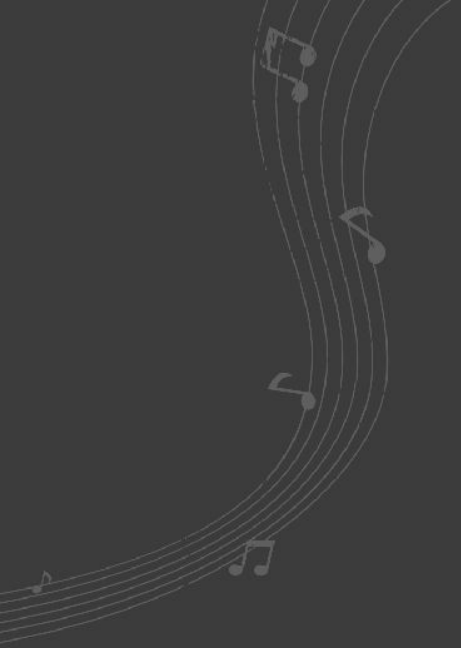
- Here is a summary of what we found:
- 3,842 total prospects
 - 967 prospects scored a Kindsight 3 or 4
 - 214 prospects at or above your \$10,000 threshold

Education Discovery Screening

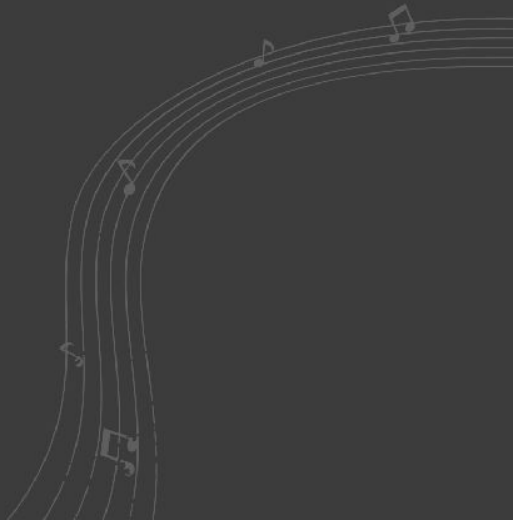
Submitted: 04/02/2026 Confidence: 4.1 Total Capacity: \$114,175,721 Prospecting Affinity: Education (General)

Screening Results Major Giving Maps Planned Giving Executive Summary

Name	Kindsight Score	Propensity	Affinity	Capacity	Est. Capacity Value
Marguerite Ellison	4	4	4	3	\$118,400
Theodore Vance	4	4	3	4	\$96,250
Priya Raghunathan	3	4	4	2	\$41,900
Callum Whitfield	3	3	4	3	\$38,720
Adaeze Okonkwo	3	4	2	3	\$27,500
Miriam Lindqvist	2	3	2	2	\$14,180
Beatrix Sorensen	2	2	3	1	\$9,640
Rowan Achterberg	2	3	1	2	\$6,300
Ingrid Halvorsen	2	2	2	2	\$5,120
Desmond Achebe	1	2	1	1	\$3,400
Yuki Tanabe	1	1	2	1	\$1,950



One More Thing ...





In Dev

for Ascend + AdvancementRM

Ask Your Data

(With KI Assistant)

Raised this year (won)

\$667,450.00

Search this list...

Owner

—

Marcus Webb

Grace Liu

Rachel Donnelly

Hi! Ask me anything about your data.
Try: "How many donors in Cali?" — or ask
for a file: "Make me an excel of major
gift donors."

Can you show me a list of donors whose
giving has decreased from last year to this
year? Include their name, PRM, total giving
for last year and this year, a column for the
difference, and the date and amount of their
most recent gift. Sort by the difference
descending.

US
Updated a few seconds ago

Lifetime raised (won)
\$2,248,960.00

Gifts (won)
237

Raised this year (won)
\$667,450.00

Search this list...

City	State	Lead Source	Owner
Pittsburgh	Pennsylvania	Direct Mail	—
San Diego	California	Event	Marcus Webb
Oakland	California	Board Referral	Grace Liu
Greenwich	Connecticut	Major Gift Officer	Rachel Donnelly
Spokane	Washington	Direct Mail	Daniel Ferreira
Boston	Massachusetts	Event	Marcus Webb
Charleston	South Carolina	Direct Mail	Rachel Donnelly
Seattle	Washington	Event	Olivia Chen-Marsh

Hi! Ask me anything about your data.
Try: "How many donors in Cali?"
or for a file: "Make me an excel of
gift donors."

Can you show me a list of donors
giving has decreased from 2022 to 2023
year? Include their name, city, state, and
for last year and this year. Also include the
difference, and the date of their most recent
most recent gift. Sort by date descending.

- ✓ Searching schema fields
- ✓ Querying the org
- ✓ Running code

year? Include their name, PRM, total giving for last year and this year, a column for the difference, and the date and amount of their most recent gift. Sort by the difference descending.

5 donors gave less this year than last.
Sorted by the size of the drop:

Name	PRM	FY2025	FY2026	Difference	Most recent gift
Dorothy Kaminski	—	\$18,000	\$1,000	-\$17,000	2026-01-12 · \$1,000
Thomas Vandenberg	Marcus Webb	\$35,000	\$20,000	-\$15,000	2026-03-04 · \$6,500
Patricia Dumont	Rachel Donnelly	\$28,000	\$15,500	-\$12,500	2026-02-19 · \$5,000
Linda Nguyen	Katherine Sullivan	\$6,000	\$500	-\$5,500	2026-04-02 · \$500
Nancy Kowalczyk	Priya Nandakumar	\$4,200	\$1,200	-\$3,000	2026-05-08 · \$600

Name	PRM	FY2025	FY2026	Difference	Most recent gift
Dorothy Kaminski	—	\$18,000	\$1,000	-\$17,000	2026-01-12 · \$1,000
Thomas Vandenberg	Marcus Webb	\$35,000	\$20,000	-\$15,000	2026-03-04 · \$6,500
Patricia Dumont	Rachel Donnelly	\$28,000	\$15,500	-\$12,500	2026-02-19 · \$5,000
Linda Nguyen	Katherine Sullivan	\$6,000	\$500	-\$5,500	2026-04-02 · \$500
Nancy Kowalczyk	Priya Nandakumar	\$4,200	\$1,200	-\$3,000	2026-05-08 · \$600

Who's assigned to Dorothy Kaminski?

No one — she has no PRM assigned. She's your largest decline this year.

Assign her to Rachel Donnelly

 Confirm this action

Update Contact
"Dorothy Kaminski"

Field	Current	New
OwnerId	—	Rachel Donnelly

Approve

Deny

Or tell me what to do instead...

Ask Your Data

Can you flag any potential duplicate constituents in the system?

I am planning an event in NYC—can you please find any constituents who have lifetime giving over 10,000 and live within 30 miles of NYC, who gave last year but haven't given this year?

Can you give me a table of my three warmest prospects and include their name, lifetime giving, and current opportunity stage if one exists?

Which of my assigned prospects who gave in 2025 haven't been contacted in the last 6 months and are overdue for outreach?

I want to know what giving cause I should form my next campaign around. What are the top three suggestions you have?

Human-Centered Agents in All Our KI Products

KI for iWave



Screening
Agent

Donor
Discovery
Agent

KI for Ascend/AdvRM



Trip Planning
Agent



Engagement
Agent

Gift
Processing
Agent

De-Duping
Agent

KI for Connect

KI Donor
Assistant

Page
Building
Agent

Giving Page
Optimization
Agent

KI for Analyze

Performance
Insights
Agent

Portfolio
Optimization
Agent

Forecasting
Agent



Kindsight Intelligence Roadmap



Available Now

Trip Planning Agent (CRM)

Screening Agent (iWave)

In Development

Predictive Models

Engagement Agent (CRM)

KI Assistant
—Ask Your Data

Planned

Gift Processing Agent (CRM)

Donor Discovery Agent
(iWave)

10+ Agent Ideas ...



AI Is Your **Partner** –Not Your Replacement



So, Now What?



One Donor Journey

One Harmonious Product Suite

Identification

Qualification

Cultivation

Solicitation

Stewardship



Four Things to Take Home

1

Success in today's environment requires Harmony.

3

Purpose-built, configurable and high-trust AI agents will complement human judgement.

2

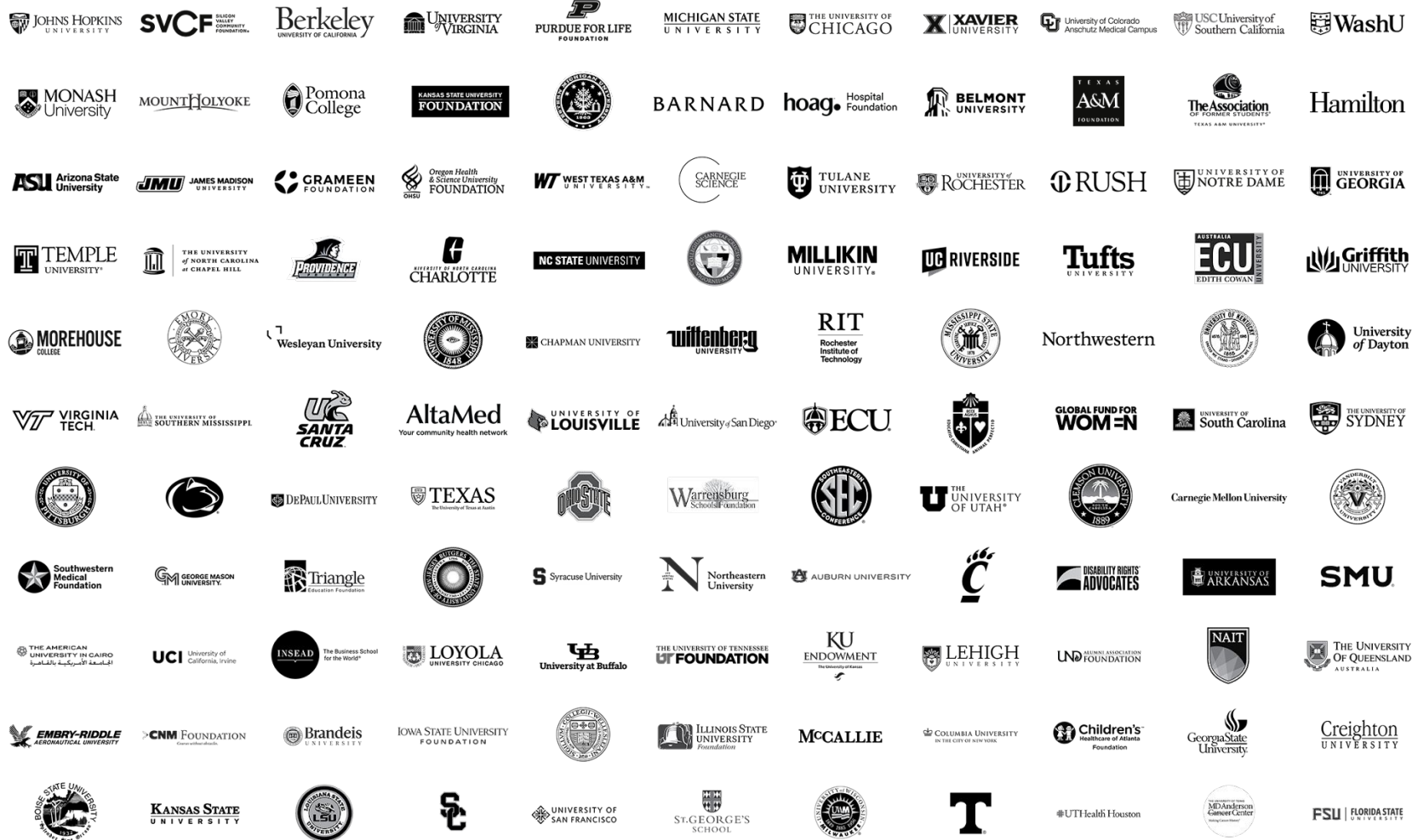
Kindsight is focused on providing a unified experience for your entire band.

4

More KI agents are on their way, along with new products that further extend your CRM.



You Are in the Band



Come Jam With Us!

See everything from this stage—hands-on.
The Product Lounge is open all week. Every demo,
every roadmap, every product team. Go play.

Community & Product Lounge

today until 4:30pm

tomorrow 8am – 12:30pm

Kindness Awards

today 4:30pm – 5pm

KindCon Party **Remember your badge and ID!*

today Busses start at 6:15 pm

 Brooklyn Bowl

Welcome to

KINDFEST

KindCon²⁰²⁶

