

Individual Prospect Donor Research.				
Last Edited: MM/DD/YY	By:			
Name (including maiden, if appropriate)				
Nickname/Prefers to be called				
Birthday				
Address				
Phone numbers (business, cell, home)				
Email				
Alternate Address				
Category (choose one)	Prospect	l Donoi	r Planned Gi	ving Prospect
Category (choose one)	Frospect	DONO	i Flatilled di	vilig F103pect
Relationship to organization, including date				
relationship began (e.g. Who referred them?				
How did they become interested or involved?				
Have they volunteered? Any board member or				
staff friendships?)				
December 1 Compton				
Recommended Next Steps (as of MM/YY)				
Employment				
Place of Employment				
Position / Title / Employed since MM/YY				
Salary and other benefits (only if major				
individual donor; note if amount is estimated)				
Website				
Address				
Previous employment				
	l			
Affiliations				
School / University				
Board affiliations				
Foundation affiliations				
Club membership/ political giving				
Club membership/ political giving				
Family				
Spouse or Partner's Name (and maiden, if approp	rioto)			
	ilatej			
Spouse or Partner's Birthday				
Spouse or Partner's Occupation				
Spouse or Partner's Affiliations				
(Volunteering/Schools/Boards/Clubs/etc.)	,			
Spouse or Partner's Philanthropy interests (if known)				
Children's names / Birthdays / Schools				
Funding History				
Current Donor Level	\$		_ as of	
Lifetime Giving Level	\$		as of	















Donor Since	MM/YY
History of giving (e.g. Annual appeal? Specific program? What has worked to get them to donate in the past?)	
Formal acknowledgement letter sent to IRS as proof of	MM/YY
donation (if donation is greater than \$250)	

Contact and Cultivation History			
Log any letter, call, program update, meeting or event invitation/attendance	Notes and date (MM/DD/YY)		











