

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   Donor   Planned Giving Prospect

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?)	
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Recommended Next Steps (as of MM/YY)	
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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	

Affiliations	
School / University	
Board affiliations	
Foundation affiliations	
Club membership/ political giving	

Family	
Spouse or Partner's Name (and maiden, if appropriate)	
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 _____

