



## **Name of Prospect & Spouse**

---

**Home Address:**

**Home Phone:**

**Cell Phone:**

**Home Email:**

**Seasonal Address:**

**Seasonal Phone:**

**Business Name:**

**Position:**

**Business Address:**

**Business Phone:**

**Business Fax:**

**Business Email:**

**Primary Business Details:**

**Meeting Time:**

**Meeting Location:**

**Attendees:**

**Purpose of Meeting/Talking Points:**

**Employment History:**

**Other Affiliations:**

**Jane Doe University Development Office Contact:**

**Jane Doe University Contact:**

**Past giving to JDU:**

- Last Giving:
- Largest Giving:
- Lifetime Giving:

**Past giving to other organizations:**

-

**Gift Potential:**

**Personal:**

**Details on children and spouse:**

**Education:**

**Honors/Award:**

**Prospect Manager Assigned:**

**Report Date:**

**Stock information:**

**Real estate information:**

**Other Assets:**

**Articles that pertain to the donor:**

**Foundation information:**

**Website:**

**Other Notes:**

**Advance ID:**

**Research Date:**

**Research Completed by:**

**Research Requested By:**