

CONFIDENTIAL PROFILE

Prospect Name

Full name of primary prospect expressed as
First "Nickname" MI Last

Picture (if available)
Please only use flattering photos.

Address
123 Any Street
City, ST ZIP
Tel: (000) 000-0000
(Please spell out street and city names)

EXECUTIVE SUMMARY

Brief Overview (No more than two lines) Expressed as: Title, Company or Foundation. Notable nonprofit affiliation.

Net Worth (Est.):

\$000.0 million+

See "Net worth and Capacity Primer"

Gift Capacity (Est.):

\$000,000 - \$000,000

Express as range; NOT a solicitation amount.

Known Interests

Use single words or short phrases, e.g. "Arts" or K-12 Education.

XX Connections

Can include National and Regional Board members as well as staff. If the connection is through a corporate or nonprofit board, that should also be indicated.

John A. Director (NA Board), through Really Big Founda Board

Jane A. Donor (ENC Board), friend

Use RE, [Leadership Directories](#) to identify connections.

XX Giving

Donor has given a total of \$000,000 to TFA since 1992, including the following notable gifts and pledges:

FY00, \$000,000 to NA Growth Fund

FY00-00, \$000,000 (verbal pledge) NJ Operations

DETAILED PROFILE

Recent News (past 18 months)

Use Google News, or Lexis-Nexis and include snippets from relevant stories such as career changes, notable gifts, marriages/divorces, births, appointments to nonprofit or corporate boards.

1/1/10: Prospect was elected to Board of Really Big Corporation. Source: NY Times.

Career

Donor is CEO of International Corporation, an Anytown, ST-based financial services firm. You can include more information about company here. Past employment should be expressed as a list.

- President, International Corporation, 2001-2008
- VP, Asset Management, National Corporation, 1997-2001
- Portfolio Manager, National Corporation, 1990-1997

Corporate Board Service

Director, Big Oil Firm

Use [Hoovers'](#) to find most recent proxy statement and Google Finance to check current value.

Financial Data

Stock: \$000 million¹

Use [Zillow](#) to check fair market value.

Real Estate: \$00 million²

Include previous year's compensation, if known.

Compensation: \$000,000 salary; \$0,000,000 bonus (2009)

Other: Here you can include any other financial or wealth indicators, such as art collections, private company sales, inheritances, etc.

Nonprofit Affiliations

- Trustee, Blue Chip Nonprofit
- Director, Educational Nonprofit
- Member, Advisory Board, Ivy League University

Philanthropy

Named, capital and endowment gifts should be expressed as brief statements, including amount, purpose (e.g. building, scholarships, etc.), and year.

\$5 million to Ivy League University to fund math fellowships, 2009

Internet search: "Donor J. Doe" site: .org or .edu

Annual gifts can be expressed as a chart, as below.

Donation Range	Recipient	Year
Amount	Nonprofit name	0000
Amount	Nonprofit name	0000
Amount	Nonprofit name	0000
Amount	Nonprofit name	0000
Amount	Nonprofit name	0000

Short cut: Use [NOZA](#) Search and export list.

¹ Value of # of shares, based on share price of \$00.00 on 1/1/10.

² Market value of City, State residence, OR Combined market value of # of residences: City, State, City, State.

Personal

Age: 00, born Month, 1, 2000

Spouse: First Last, married Month 1, 2000
Spouse is the president of Blue Chip Nonprofit. She is an alumna of Ivy League University ('00).

Children: John (Age), Jane (Age)

Education: BA, Ivy League University, '00
MBA, State University at City/Town, '00

Political

Affiliation(s): Party (or Undeclared)

Giving: \$000,000 to Party candidates and causes since 19??.

Views on Education

Can come from both internal (e.g. meeting debriefs) or external (news stories, speeches, and other public remarks). Be sure to note the date and source.