

## Individual Donors

# Prospect Worksheet

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<b>Basic Information</b>
Name (first, middle, last):
Title (Mr., Ms., Mrs., Dr.):
Former or maiden name or nick name:
Address:
Phone number(s):
Alternate address:
<b>Employment Information</b>
Place of Employment:
Web site (if any): http://
Address:
Work phone number:
Work e-mail:
Position (title):
Since (date):
Salary and other benefits (estimated):
Other relevant employment-related data (former employment):
<b>Personal Information</b>
Schools attended:
Board affiliation(s):
Foundation affiliation(s) (if any):
Civic/volunteer interests:
Social (include club memberships):

Hobbies:
Giving history (include large gifts, dates, etc.):
Assets (real estate, stock, etc.):
Other wealth indicators:
<b>Family Information (if applicable)</b>
Spouse's name:
Spouse's occupation:
Spouse's affiliation(s):
Spouse's philanthropy:
Children's school(s):
<b>Connection to your organization</b>
Board member (dates):
Volunteer (current?):
Current or past donor (amount and other details):
Friend of board member or staff (provide contact name):
Other (shared interests, etc.):
<b>Area(s) of commonality with the prospect</b>
Prior giving history:
Geography:
Subject field:
People:
Other:

<b>Sources consulted (provide URLs, dates, and other details)</b>
Search engines (terms used):
Web sites:
Databases:
Contribution lists:
Directories:
Newspapers:
Other:
<b>History of past cultivation (if any)</b>
Type (letter, call, invitation, meeting, etc., and dates):
<b>Recommended next step(s)</b>
(Indicate deadlines):