**Prospect Name**

(photo)

**DONOR PROFILE | DATE**

|  |
| --- |
| **PERSONAL INFORMATION** |
| Address |  |
| Phone/Email |  |
| Birthday |  |
| Family |  |
| Occupation |  |

|  |
| --- |
| **CAPACITY** |
| Total Assets |  |
| Estimated Gift Capacity Range |  |
| Other Wealth Indicators |  |
| Giving Vehicle(s) |  |

**BIO:**

**CONNECTION(S) TO ORGANIZATION:**

**KEY INSIGHTS:**

**PHILANTHROPY:**

|  |
| --- |
| **GIVING – GENERAL OVERVIEW** |
| Philanthropic Interests |  |
| Giving History |  |
| Board Affiliations |  |
| Notable Gifts |  |

|  |
| --- |
| **GIVING – ORGANIZATION** |
| Total Giving and # |  | **Average Gift Size** |
| Largest Gift/Pledge |  | # |
| Most Recent Gift & First Gift  |  |
| 5-Year Gift Total |  |
| 2022 Total Giving |  |
| Past Engagement |  |
| Legacy Gift Indication |  |

**IDEAS FOR ENGAGEMENT AND CAMPAIGN INVOLVEMENT**

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