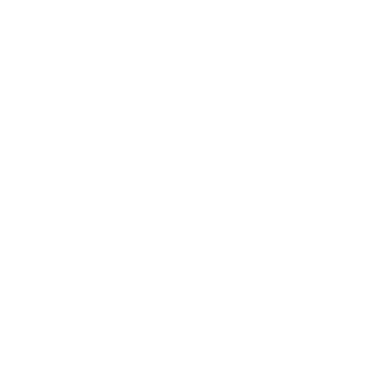
**Prospect Name**



(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**