A close-up of a logo

Description automatically generated**Prospect Name**  
**City, State  
*Job Title / Company***

**Home Address**:   
A prospect’s location can reveal wealth indicators, local connections, and regional philanthropic interests.

-

**Capacity Rating**: $   
A 10% estimate of a prospect’s net worth; it is used to guide a gift officer’s ask over a 5-year pledge period.

--  
**Recent News**: Keep up with personal and business developments that impact the prospect’s wealth or interests.

**Company**: Understand how the prospect builds their wealth and where they invest their time and resources.

**Career**: Track their professional journey to spot future potential for growth and philanthropy.  
 **Boards**: Corporate and volunteer boards hint at wealth, influence, and philanthropic priorities.  
 **Philanthropy**: Verified giving to other organizations reveals patterns, priorities, and potential future gifts.  
-  
**Education**:

* **Undergraduate**: Alma mater connections may reveal loyalty and philanthropic ties.
* **Graduate Degree**: Advanced degrees signal professional networks and potential giving capacity.

**Family**:

* **Spouse**: A spouse can significantly influence philanthropic decisions, especially if they also generate wealth. Including this information provides a fuller picture of the household's giving potential.
* **Children**: Due to privacy considerations, Prospect Briefings should not delve into names or ages of minors. However, knowing if a prospect has children can inform their giving preferences, as family-focused individuals may prioritize charitable causes benefiting children or education.
* **Other Relatives**: In cases where other relatives are significant figures in wealth generation, this information can be helpful in uncovering additional philanthropic influences and potential family wealth.

**Strategy Notes:** Based on what our researchers have learned about your prospect, we offer a brief description of actionable next steps and potential outcomes for your executives, fundraisers, and staff to use in your next donor engagement.