

PROSPECT PROFILE FORM

Date Prepared: _____ Date Revised: _____

Source (s): _____

Cards: donor _____ prospect _____

Trustee	Donor	Friend	Mailing List	# of solicitations
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Last Name	Educational Background
First/Middle Names	Social/Business Activities
Residence Address/Phone	
Business Address/Phone	Spouse Name (Maiden, if applicable)
Position/Title	Marriage Date
Directorship/Business Affiliations (Shares held)	Family History (Children / Parents / Interests / Achievements / Other Information)
Foundation Affiliations	
Community/Philanthropic/Social Affiliations	Political Affiliation
Professional Memberships	Religious Affiliation
	Military Service
Special Interests	Attorney
Awards/Honors/Etc.	Bank
	Trust Officer
Close Friends/Relevant Personal Relationships	Tax Advisor

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Financial data (include any available information on income/wealth/etc.)	
Summary gift record year/total contributed/comments	Gift potential evaluation for (by whom/when)
Gifts to other organizations	Activities
Additional comments	
Research resources checked (date/initials/etc.)	