



## Confidential Information For Authorized Purposes Only

Information is not to be used without permission

**Name:** *First, Middle (Initial), & Last Name, Honourific*

**Spouse Name:** *First, Middle (Initial), & Last Name, Honourific*

**Address:** *Primary, secondary, vacation as needed*

**Telephones & Other Contact:**

**Prospect Managers:** *People responsible for this prospect's Cultivation, Solicitation or Stewardship Plan*

**Secondary Prospect Managers:** *Other people responsible for this prospect & role*

**Organization Affiliations:** *How they connect to our organization*

**Critical Notes:** *Snapshot alerts to anyone reading this report*

### Affiliations With Hull

- Awards & Honours: *Bestowed by us*
- Committee Membership: *Their activity with us*
- Participation in Events: *When and for what purpose*
- Recognition Provided: *Written, verbal, permanent*

### Previous Giving History

- Total Gifts: *From first to current date*
- First Gift: *Dollar amount, when and for what*
- Last Gift: *Dollar amount, when and for what*
- Largest Gift: *Dollar amount, when and for what*

**Philanthropic Interests:** *Related to us first, and in general second*

**Philanthropic Dislikes:** *Related to us first, and in general second*

### **Additional Demographic Information**

- Birthdate & Birthplace:
- Spouse Birthdate & Birthplace:
- Spouse's Connection *Connection to us*

### **Business/Work Information**

*Current and past in chronological order*

- Staff Role:
- Partnerships:
- Chairmanships:
- Directorships:
- Board Roles:
- Memberships:

### **Personal Interests**

- Awards & Honours: *In the community*
- Philanthropic Activities: *Known gifts to all charities, grouped by charity*

### **Professional & Personal Network**

*Lists of people, their business & social connection, who may influence the prospect*

### **Wealth Indicators**

- Home Property Assessment: *Publicly available*
- Estimated Share Values: *Validated sources, by company*
- Other indicators

### **Contact Chronology:**

*Notes on meetings in chronological order, who attended, nature of discussion, date, location*

### **Solicitation Notes:**

*Useful information, directions from the prospect manager, advice from others, summary of the Solicitation Plan*

### **Stewardship Notes:**

*Information for stewardship activities, directions from the prospect manager, advisory for others, summary of Stewardship Plan*

**Date of This Research Report:** *Most recent date*

**Name of Researcher:** *Name*