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Confidential
Executive Profile with Estimated Giving Capacity
FORMAT SAMPLE



Best Prospects Consulting

Mr. John A. Prospect

(a.k.a. John Arthur Prospect)

Picture of prospect and/or family members if found

DOB: Date of birth

Business Address:

Name
Title
Business Name
Business Address
City, State, Zip
Business Phone
Business Fax
Business Email

Home Address:

Home Address
City, State, Zip
Home Phone
Home Fax
Home Email

Second Address:

Second Address
City, State, Zip
Second Address Phone

BUSINESS/SOURCE OF WEALTH

Biographical paragraph(s) describing business history, source of wealth, affiliations family, and philanthropy.

ESTIMATED GIVING CAPACITY

- Estimated Total Gift Capacity based on known assets:
\$Number (High)
\$Number (Mid)
\$Number (Low)

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- Suggested Ask Range for Client: (*Best Prospects Consulting can only provide these numbers if client discloses information about prospect participation and giving history with its organization*)

\$Number (High)

\$Number (Mid)

\$Number (Low)

FAMILY CONNECTIONS

Birthplace: Place, region, or country prospect was born and/or spent formative years.

Spouse: Current spouse including full name, date of birth, and date of marriage.

Ex-spouses including full names, dates of birth, and dates of marriage.

Children/Family: All children and familial relations.

AFFILIATIONS

Business Affiliations: Current workplace, director or founder affiliations, and any other valid business affiliations.

Non-profit Affiliations: Volunteer leadership roles and events attended.

Education: List of schools attended, graduated, and degree awarded.

FINANCIALS

Planned Gifts: Planned gifts to external organizations.

Political Contributions: Political contributions made since 2000.

External Contributions: Contributions made to external non-profit organizations.

Compensation: Estimated or actual salary. Private company information is also included here, if applicable.

Securities: Insider securities, value, and past transactions if prospect is an insider in a publicly-traded company.

Real Estate: List of current real estate holdings, purchase price, original mortgage balance, picture, and current market or assessed value.

Private Foundation: Private foundation affiliation along with address, assets, trustees, and a selection of grants.

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- Notes:** Items that could be important to growing the relationship between client organization and individual prospect.
- Next Steps:** If client organization has disclosed its internal information related to the prospect, Best Prospects Consulting occasionally recommends a next step based on new data.
- Key Articles:** Important news articles.

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Sources Consulted: (Though many sources were checked, only those where information was found are listed)

Source citations for Executive Profile with Estimated Giving Capacity about Mr. John A. Prospect.

Date profile was created for department name of client organization by Best Prospects Consulting, www.best-prospects.com

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