CONFIDENTIAL PROFILE

Prospect Name

Full name of primary prospect expressed as

First "Nickname" MI Last

See "Net worth and Capacity Primer"

Express as range; NOT a solicitation amount.

Use RE, <u>Leadership</u>
<u>Directories</u> to identify

connections.

Picture (if available)

Please only use flattering photos.

Address 123 Any Street City, ST ZIP Tel: (000) 000-0000

(Please spell out street and city names)

EXECUTIVE SUMMARY

Brief Overview (No more than two lines) Expressed as: Title, Company or Foundation. Notable nonprofit affiliation.

Net Worth (Est.): \$000.0 million+

Gift Capacity (Est.): \$000,000 - \$000,000

Known Interests Use single words or short phrases, e.g. "Arts" or K-12

Education.

XX Connections Can include National and Regional Board members as well as

staff. If the connection is through a corporate or nonprofit board,

that should also be indicated.

John A. Director (NA Board), through Really Big Found

Board

Jane A. Donor (ENC Board), friend

XX Giving

Donor has given a total of \$000,000 to TFA since 1992, including the following notable gifts and pledges:

FY00, \$000,000 to NA Growth Fund

FY00-00, \$000,000 (verbal pledge) NJ Operations

DETAILED PROFILE

Recent News (past 18 months)

Use Google News, or Lexis-Nexis and include snippets from relevant stories such as career changes, notable gifts, marriages/divorces, births, appointments to nonprofit or corporate boards.

1/1/10: Prospect was elected to Board of Really Big Corporation. Source: NY Times.

Internal Document Updated:

Internet search: "Donor J. Doe" site: .org or .edu

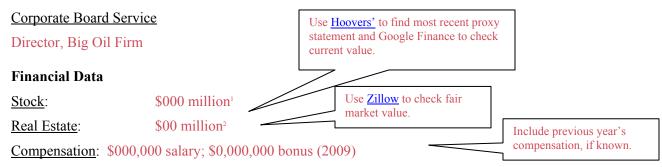
Career

Donor is CEO of International Corporation, an Anytown, ST-based financial services firm. You can include more information about company here. Past employment should be expressed as a list.

President, International Corporation, 2001-2008

VP, Asset Management, National Corporation, 1997-2001

Portfolio Manager, National Corporation, 1990-1997



Other: Here you can include any other financial or wealth indicators, such as art

collections, private company sales, inheritances, etc.

Nonprofit Affiliations

Trustee, Blue Chip Nonprofit Director, Educational Nonprofit Member, Advisory Board, Ivy League University

Philanthropy

Named, capital and endowment gifts should be expressed as brief statements, including amount, purpose (e.g. building, scholarships, etc.), and year.

\$5 million to Ivy League University to fund math fellowships, 2009

Annual gifts can be expressed as a chart, as below.

Donation Range		Recipient	Year
Amount	Nonprofit name		0000
Amount	Nonprofit name		0000
Amount	Nonprofit name		0000
Amount	Nonprofit name		0000
Amount	Nonprofit name		0000
			Short cut: Use NOZA
			Search and export list.

¹ Value of # of shares, based on share price of \$00.00 on 1/1/10.

² Market value of City, State residence, OR Combined market value of # of residences: City, State, City, State.

Personal

Age: 00, born Month, 1, 2000

Spouse: First Last, married Month 1, 2000

Spouse is the president of Blue Chip Nonprofit. She is an alumna of Ivy

League University ('00).

Children: John (Age), Jane (Age)

Education: BA, Ivy League University, '00

MBA, State University at City/Town, '00

Political

Affiliation(s): Party (or Undeclared)

Giving: \$000,000 to Party candidates and causes since 19??.

Views on Education

Can come from both internal (e.g. meeting debriefs) or external (news stories, speeches, and other public remarks). Be sure to note the date and source.