



The Foundation Center's Prospect Worksheet—Individual Donors

Basic Information
Name (first, middle, last):
Title (Mr., Ms., Mrs., Dr.):
Former or maiden name or nickname:
Address:
Phone number(s):
Alternate address:

Employment Information
Place of Employment:
Web site (if any): http://
Address:
Work phone number:
Work e-mail:
Position (title):
Since (date):
Salary and other benefits (estimated):
Other relevant employment-related data (former employment):

Personal Information
School(s) attended:
Board affiliation(s):
Foundation affiliation(s) (if any):
Civic/volunteer interests:
Social (include club memberships):
Hobbies:
Giving history (include large gifts, dates, etc.):
Assets (real estate, stock, etc.):
Other wealth indicators:

Family Information (if applicable)
Spouse's name:
Spouse's occupation:
Spouse's affiliation(s):
Spouse's philanthropy:
Children's school(s):

Connection to your organization
Board member (dates):
Volunteer (current?):
Current or past donor (amount and other details):
Friend of board member or staff (provide contact name):
Other (shared interests, etc.):

Area(s) of commonality with the prospect
Prior giving history:
Geography:
Subject field:
People:
Other:

Sources consulted (provide URLs, dates, and other details)
Search engines (terms used):
Web sites:
Databases:
Contribution lists:
Directories:
Newspapers:
Other:

History of past cultivation (if any)
Type (letter, call, invitation, meeting, etc., and dates):

Recommended next step(s)
(Indicate deadlines):