

# DONOR PROSPECT RESEARCH FORM

Name: \_\_\_\_\_ Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Common interests to TCY: \_\_\_\_\_

Classes / Events Attended	Date	Remarks
_____	____/____/____	_____
_____	____/____/____	_____

Business/Profession: \_\_\_\_\_

Bus. Address: \_\_\_\_\_

*CIRCLE ONE: Yes / No (Do we have matching gift forms on file?) SHOULD WE? Yes / No*

Business Title: \_\_\_\_\_

Phones: Home: \_\_\_\_\_ Bus: \_\_\_\_\_ Cell: \_\_\_\_\_

Secretary: \_\_\_\_\_

Email: \_\_\_\_\_

Websites: \_\_\_\_\_

Other jobs: \_\_\_\_\_

Previous jobs: \_\_\_\_\_

If retired: Company: \_\_\_\_\_ Year retired: \_\_\_\_\_

## SPOUSE

**NAME:** \_\_\_\_\_ Birth date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Common interests to TCY: \_\_\_\_\_

Business/Profession: \_\_\_\_\_

Bus. Address: \_\_\_\_\_

*CIRCLE ONE: Yes / No (Do we have matching gift forms on file?) SHOULD WE? Yes / No*

Business Title: \_\_\_\_\_

Phones: Home: \_\_\_\_\_ Bus: \_\_\_\_\_ Cell: \_\_\_\_\_

Secretary: \_\_\_\_\_

Business Email: \_\_\_\_\_

Websites: \_\_\_\_\_

Other jobs: \_\_\_\_\_

Previous jobs: \_\_\_\_\_

**RESIDENCE:** Winter-Spring (dates): \_\_\_\_\_

Address: \_\_\_\_\_

Phones: Home: \_\_\_\_\_ Bus: \_\_\_\_\_ Cell: \_\_\_\_\_

**RESIDENCE:** Summer-Fall (dates): \_\_\_\_\_

Address: \_\_\_\_\_

Phones: Home: \_\_\_\_\_ Bus: \_\_\_\_\_ Cell: \_\_\_\_\_

**Directorates and other companies:**

- 1.
- 2.
- 3.

CIRCLE ONE: Yes / No (Do we have matching gift forms on file?) SHOULD WE? Yes / No

Estimated annual salary: \_\_\_\_\_

Bonuses: \_\_\_\_\_

Estimated profit from business: \$ \_\_\_\_\_

Other sources of income: \_\_\_\_\_

Estimated net worth: \$ \_\_\_\_\_

Other evidence of wealth: \_\_\_\_\_

**Education**

School/College/University	Dates Attended	Degrees
1. _____	_____	_____
2. _____	_____	_____

Military service: \_\_\_\_\_

Religion: \_\_\_\_\_

Political Party: \_\_\_\_\_

Organizations:	Offices Held
1. _____	_____
2. _____	_____
3. _____	_____

Clubs:	Offices Held
1. _____	_____
2. _____	_____

**WHO knows this prospect?**

Name:	Relationship
1. _____	_____
2. _____	_____

Interests in our program: \_\_\_\_\_

**Tournaments / Events Attended**

Event Title	Event Date	Event Involvement
_____	____/____/____	_____
_____	____/____/____	_____

## Giving History

Last Gift \$ \_\_\_\_\_ When: \_\_\_/\_\_\_/\_\_\_ Why: \_\_\_\_\_  
Largest Gift \$ \_\_\_\_\_ When: \_\_\_/\_\_\_/\_\_\_ Why: \_\_\_\_\_  
Cumulative Total: \$ \_\_\_\_\_  
Years given: \_\_\_\_\_ to \_\_\_\_\_  
Volunteer history: \_\_\_\_\_  
Boards:  
Committees:  
Special abilities:  
TCY Program Interests:

## Children

Names	Birth Dates	Remarks: Schools, Marital Status, Role in Family Bus.
_____	_____	_____
_____	_____	_____
_____	_____	_____

Attorney name: \_\_\_\_\_ Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Financial advisor: \_\_\_\_\_ Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Banker name: \_\_\_\_\_ Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_

RESEARCHED BY: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

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