

Insert Your Campaign and Org Logo

Name of Prospect
YOUR ORG NAME Confidential File
Date:

HOME ADDRESS:	Raiser's Edge #:	PHOTO
ADDITIONAL ADDRESS:	DOB:	
	Spouse:	
INDUSTRY:	Prospect Manager:	
	Report Requested By:	
	Capacity Rating: \$1-\$10 million	

SUMMARY:

- _____ and Brenda have a home on _____ in _____. They have kept their CA home which is where they spend holidays; family lives in that area.
- _____ retired from _____ in January 2006.
- They have a capacity of giving a lead gift in the campaign.
- They have a relationship with _____ and wife Brenda has Y experience from the La Jolla YMCA.
- They are also friends with _____.

BACKGROUND/FAMILY:

CORPORATE:

- _____ served as Chairman, CEO, and Director of _____ from September 2000 until his retirement in January 2006. He served as Vice Chairman and COO of _____ from June 1998 to June 2000. _____ was President and CEO of _____, the parent company of _____ from 1996 to 1997, and was an Executive Vice President of _____ from 1993 to 1996. Prior to joining _____ in 1985, he was Senior Vice President and General Counsel of the _____ from 1982 to 1985.
- _____ has served as a Director of _____ (a publicly traded information technology company) since 1999 and serves as Chairman of its Audit Committee.

Confidential Profile

Name of Prospect

-
- _____ was elected as Director of _____ in February 2006 and serves on the Audit and Conflicts Committee as well as the Governance Committee. _____ is a North American midstream energy company that provides a range of services to producers and consumers of natural gas, natural gas liquids (NGLs) and crude oil.

Name of your Community AFFILIATIONS/CONNECTIONS:

- _____ hosted a “welcome to the neighborhood” party for _____ and Brenda in June 2006.
- Carl invites Brenda to all of the Board meetings and events going on; she considers her a neighborhood friend.

PROSPECT GIVING:

-

PROSPECT INTERACTION:

Selected highlights:

- Cindy and Carl met with Brenda in early September to tell her more about the project. She said she would be happy to serve on an Advisory Board, but not on the main Board, as they travel a lot.
- She attended Summit #2.
- Brenda and _____ would be happy to host an event or dinner.
- Carol spent a long time talking with _____ and Brenda at a cocktail party at _____’s home on October 28th.

ASSET INFORMATION:

Compensation: \$4,000.000

Stock: \$14,013,086.81 (Holdings)

Real Estate: House in - \$1,024,766 (2005 Assessment)
House in - \$1,194,600 (2006 Assessment)

Total Visible Assets: \$20,000,000+

RESEARCH ANALYSIS:

Capacity Rating: Donorscape Capacity 2 (\$1-\$10 million)

OTHER PHILANTHROPY:

<u>Amount</u>	<u>Organizations</u>	<u>Year</u>	<u>Notes</u>
\$1,500	Republican Party		
\$7,500	Democratic Party		

OTHER AFFILIATIONS:

- _____ is a Board Member of the _____ Theatre in.
- _____ serves on the Board of the _____ of the Boy Scouts of America.
- He is a Board Member of the _____ Foundation.
- Member of the _____ Council on International Policy.
- Member of the _____ Business Advisors Board and the _____ Business Roundtable.

PERSONAL INTERESTS:

- Wine aficionados
- _____ belongs to a French organization of xxxxx drinking cups – wine tasters and experts – he’s an officier commandant or sommelier – they dress in regalia for formal gatherings

Confidential Profile
Name of Prospect

- He was asked at a conversation at _____ University, “As a business leader, what would you like your legacy to be?
His answer: I’m going to retire in a year-and-a-half and I would like my legacy to be that I have left the company a good place to work in, one that has made a lot of people’s lives better. My tendency is not to take great risks of any kind in the sense I don’t try to take ethical risks, and I don’t try to take big business risks. I want to know that I have protected people’s savings and their well-being and their jobs, and that they have been left feeling good about themselves with their, the company’s, and my reputation intact.

Report prepared by:

Date prepared:

Sources Cited: Donorscape (Lexis-Nexis Real Estate, FEC Contributions, Thomsons Financial SEC Stock Disclosures, Market Guide, Dun & Bradstreet), zoominfo, Google, Harvard College, Pepperdine University,