

Research – Level I

Prospect Review Brief Format (Snapshot)

Name - Preliminary Rating (Capacity/Affinity)

ID#

Residence

Year of birth or age estimate

Summary of giving and affiliation history

Professional summary

Major nonprofit affiliations

Major known philanthropy

Example:

Mr. Kenneth L. Wolf – 2A*

#264987

- 1040 5th Avenue, PHB
- Early 50s
- Total Giving: \$17,500; Active Conservator (\$2500 level; renewal in May); joined Conservator program in 1995; increased to current level in 2005; regularly attends Halloween Ball with spouse Lauren Z. Wolf as guest of Trustee James Marshall.
- Founder and Principal, Amadeus Capital Corp., a private equity firm with assets of \$2.5 billion.
- Nonprofit Boards: Nantucket Preservation Trust; Ducks Unlimited; Trout Unlimited.
- Philanthropy:
 - \$25,000 to Ducks Unlimited, annual gifts, 2005, 2004, 2003
 - \$150,000 to Nantucket Preservation Trust, 2003
 - No private foundation found.

**In our rating system, “2B” would refer to a prospect who has a 5-year total giving capacity in the range of \$1,000,000-4,999,999 and is closely affiliated with our organization based on a long history of prior giving, regular attendance at events and a relationship with a current trustee. At this stage, these are preliminary ratings, based on one or two known assets, current income or recent philanthropy.*