

HANDOUT #2: RESEARCH LEVEL 2/3

**CONFIDENTIAL
RESEARCH PROFILE – LASTNAME, FIRSTNAME**

PHOTO IF AVAILABLE

NAME

ID#:

Profile Date:

Rating:

Address/Contact information

Organizational Affiliation:

Giving History:

Event Attendance:

Contacts:

Professional History:

Awards

Corporate Affiliations

Attach lists of board members as needed.

Nonprofit Affiliations:

Attach lists of board members as needed.

Personal: (Age, DOB, spouse, children, other important family, hobbies)

Education:

Philanthropy:

Political Giving:

[Brief] Wealth Indicators Summary [Known Assets]:

Attached Wealth/Capacity Analysis Worksheet as Needed.

Notes:

Researcher: