

Research Request

Name(s) to be researched:

If spelling is questionable, please check here:

Submitted by:

Date required*:

*must be filled out for form to processed

For use by*:

*i.e., other staff member, trustee, volunteer solicitor, etc

Meeting date:

Date submitted:

Research Needed:

Type of Profile (please check all that apply)

Individual Foundation Corporate

Purpose of Research:

- New prospect Update on established prospect
- Cultivation activity/meeting/event (please specify):
- Solicitation
- Other (please specify)

Level of Research Needed (for individuals)

- Level I: Basic Biographical, Qualification
- Level II: Full Profile
- Wealthpoint [Blackbaud] screening/qualification only
- Other: see below

Specific Information/Analysis Needed (for individuals/foundations or corporations)

Known Background Information:

Prospect is in Pledgemaker: yes no ID#:

Please list or attach other information you know about the prospect that is not already contained in Pledgemaker. Examples: spouse/place of residence/ownership of real estate/friends/family/clubs/corporate connections/telephone number/interests/CPC connections.