

## **Types of Profiles**

### **Individual Basic Profile**

**Requirement: no previous contacts and/or no contact reports posted**

**Stage of relationship: Identification**

Full name and address confirmed

Spouse

DOB

Phone number confirmed

Education (if publicly available)

Profession/job title and basic company information

Charitable donations

### **Individual Financial Profile**

**Requirement: previous contacts made, contact reports posted**

**Stage of relationship: Qualification, Cultivation**

Full name and address (confirm)

Phone number (confirm)

Profession/job title and company information

Value of real estate property with picture

Salary/compensation (when available) or estimate based on position description (if possible)

Stock holdings (when available)

Charitable donations

Estimated capacity

### **Individual In-depth profile**

**Requirement: Qualified for major gift; person is ready for an ask, contact reports have been posted**

**Stage of relationship: Solicitation**

Full name and address confirmed

Spouse

DOB

Phone number confirmed

Education (when publicly available)

Career history

Profession/job title and basic company information

Salary/compensation (when available) or estimate based on position description (if possible)

Stock holdings (when available)

Charitable donations

Capacity (amount suggested as total charitable giving to all organizations over a 5 year period; based on a formula common to prospect research field and "intuition")

Inclination rating

News articles (when available)

**Company Basic Profile****Requirement: no previous contacts and/or no contact reports posted****Stage of relationship: Identification**

Company name, address, phone and fax

Public or private

Parent company (if applicable)

# Employees

Top employees and/or specific contact for company if requested by title

Company description including products/services provided

Sales/revenue (when reported publicly) or estimate

Charitable donations and/or established company philanthropic programs

**Company In-depth Profile****Requirement: solicitation planned, contact reports posted****Stage of relationship: Qualification/Solicitation**

Company name, address, phone and fax (confirm)

Parent company (confirm)

Top employees and/or specific contact for company if requested by title

Relationship connections to UT (when applicable)

Individual brief profiles of top executives (if requested and available)

Company description including products/services provided

Sales/revenue (when reported publicly) or estimate

Charitable donations and/or established company philanthropic programs

Foundation information (if applicable)

Inclination rating

News articles (when available)