

INDIVIDUAL DONOR PROSPECT PROFILE TEMPLATE

The individual donor prospect profile template is created to assist your organization with new donor prospects. It is best to learn, understand, and involve your donors so you can know how to engage them in your organization. It is important to appreciate your donors and not only value them for monetary purposes. Part of ensuring value is understanding they are humans first and not money machines.

Donor Full Name

Remember to include title and post-nominals

City, State

Current location

Database ID

If using a CRM, include direct link and/or unique ID

Add Photo Here

Synopsis

Short bio, include date of birth and country of origin

Contact Details

The contact details of the donor/prospect, e.g.
Street address; email; Telephone number; Mobile
Also include the secretary/executive assistant's contact details if known

Relationship to Organization

Provide information about the donor/prospect's history with your organization; any previous donations/support made to your organization; the last time the person was contacted; previous attendance at events; any special things to note, etc.

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Estimated Wealth

The estimated wealth of the individual/family. Real estate, stocks, annual income, etc.

Political Views

What is their political party? Are they very progressive, moderate, conservative, etc.?

Spouse/Family

Spouse's name, children's names, children's ages
Include Spouse's occupation and education history if available

Family History

If donor is wealthy, it is likely they have a family history. Add their family history here.

Education

Educational qualifications and years awarded;
Names of universities, name of high school, etc.

Current Position + Employment History

List their current employer and position
Include any relevant employment history

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Issues + Topics of Interest

Committee or Board Positions

Bullet point list of committee/board positions

Awards/Honors

List awards or honors received

Social Media Handles

Link Facebook, Instagram, Twitter, etc. accounts

Publications (If Any)

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Political Contributions

Include previous political donations. Use [fec.gov](https://www.fec.gov) to look up individual political contributions.

Charitable Contributions

Platforms like iWave can tell you the donor's previous contributions. Previous contributions can also be found by using Google to look at annual reports and event sponsors for similar nonprofits.

Sources

List sources of information used for the profile