

NAME _____

	Residential Contact		Business Contact	
	T		T	
	M		M	
	E		E	
Date of Birth		F		

LINKAGE

LINKS TO INSTITUTION (is the individual linked and how)?

--

COMMUNICATION FROM INSTITUTION

--

CONTACTS AND PEERS

--

INTEREST

EDUCATION (what did individual study)

--

CURRENT EMPLOYMENT

--

CAREER HISTORY/RESPONSIBILITIES/ACHIEVEMENTS

--

DIRECTORSHIPS

Appointed

Registered

--	--	--

PROFESSIONAL ASSOCIATION MEMBERSHIPS

--

AWARDS AND HONOURS

--

MOTIVATIONS AND INTERESTS

--

CLUBS AND MEMBERSHIPS/COMMUNITY ENGAGEMENT

--

ABILITY

FAMILY SIZE/DEPENDENTS

--

ESTIMATION OF ANNUAL REMUNERATION

--

WEALTH/SHARES/REAL ESTATE

--

CHARITABLE ACTIVITY AND PHILANTHROPY

--

GIFTS TO INSTITUTION

--

SOURCES

--

<u>Prospect name</u>	<u>Linkage (1-5)</u>	<u>Ability (1-5)</u>	<u>Interest (1-5)</u>	<u>Rating (TOTAL)</u>	<u>Strategy</u>