

Potential Major Donor/Leadership List

Confidential

A key factor in successful major gift fundraising on behalf of **ORGANIZATION** will be “prospecting”. Prospecting is a method used to identify and gain significant information on individuals having both the potential interest and financial ability to contribute to, or take a leadership role in this major fundraising initiative.

Please review the names contained in the following pages and indicate, as appropriate, information with respect to the following three key areas:

- ◆ Estimated gift potential
- ◆ Best person to contact
- ◆ Suggested strategy for approach and/or prospect’s particular interests

It should be noted that the addition of new names is also an important element of “Prospecting”.

SAMPLE

ANNOTATED MAJOR PROSPECT LIST

| NAME | TARGET GIFT LEVEL | BEST PERSON TO CONTACT | COMMENTS | NEXT STEPS |
|---|-------------------------|------------------------|--|------------|
| Mr. and Mrs. Joe Anderson 2930 South Main Street Pasadena, CA 90001 (888) 555-1122 (e-mail address) | \$50,000 - \$100,000 | | Not known as a philanthropist; is considered a professional “deal maker”; he is on a number of corporate boards and is well connected. Their house has been used as a venue for events. | |
| Mr. and Mrs. Sam Brown 1500 Elm Street Los Angeles, CA 90018 (213) 555-0900 (e-mail address) | \$100,000 - \$1,000,000 | | Associated with several foundations; has not been a huge supporter in the past; were impressed with the outreach; they are supporters of the Center and have many other allegiances. | |
| Steven Jones 412 Stone Ave. Bakersfield, CA 90002 (Need phone #) (e-mail address) | | | A professor; creates new medical companies. | |

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ANNOTATED MAJOR PROSPECT LIST

| NAME | TARGET GIFT LEVEL | BEST PERSON TO CONTACT | COMMENTS | NEXT STEPS |
|--|----------------------|---------------------------|--|------------|
| Mr. and Mrs. John Smith 980 Sunny Lane San Diego, CA 91000 (919) 555-7421 (e-mail address) | \$50,000 - \$500,000 | | Major supporter of museums and education—on the Board; very active in the community. | |

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