

**Major Gifts Campaign**

Prospect Information & Solicitation Report----STRICTLY CONFIDENTIAL

Lead Solicitor \_\_\_\_\_

Individual Prospect \_\_\_\_\_ Spouse \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Corporation/Foundation \_\_\_\_\_

Contact \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Relationships To Us \_\_\_\_\_

Contribution Summary Of Prior-Current Annual Fund, Endowment, Capital, Etc., Support

Amount To Be Requested From The Prospect \$ \_\_\_\_\_

Partner(s) In Helping To Make The Solicitation \_\_\_\_\_

Solicitation Strategy, Advice, Etc. \_\_\_\_\_

**Notes And Check-List For The Solicitor's Activity And Report:**

Date (s) Of Contact (s) And Comments \_\_\_\_\_

- Have I ? :
- Presented the brochure \_\_\_\_\_
  - Presented the pledge card \_\_\_\_\_
  - Reviewed "Membership" opportunities \_\_\_\_\_

Results: • Pledge amount \$ \_\_\_\_\_ Payment due \_\_\_\_\_  
• Describe form of gift, i.e., cash, securities:

- Decision Pending \_\_\_\_\_ Next steps \_\_\_\_\_
- Refused \_\_\_\_\_ Why \_\_\_\_\_

**When completed, please return this form to Campaign Headquarters:**

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