

**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:**

\_\_\_\_\_  
\_\_\_\_\_