

### Gift Planning Prospect Referral Form

Your name: \_\_\_\_\_ Company (if appropriate): \_\_\_\_\_

Address (City, State, Zip): \_\_\_\_\_

Email address: \_\_\_\_\_ Phone: \_\_\_\_\_

\*you may also submit this form anonymously

Prospect name: \_\_\_\_\_ Record number: \_\_\_\_\_

Company \_\_\_\_\_ Professional Advisor(s) (if any): \_\_\_\_\_

Address (City, State, Zip): \_\_\_\_\_

Email address: \_\_\_\_\_ Phone: \_\_\_\_\_

Family (spouse, children, other): \_\_\_\_\_

Sources of wealth (vocation, inheritance, properties, investments, etc.): \_\_\_\_\_

\_\_\_\_\_

Connections to our organization (colleagues, friends, family, etc.): \_\_\_\_\_

\_\_\_\_\_

Giving history to our organization: \_\_\_\_\_

\_\_\_\_\_

Volunteer history with our organization: \_\_\_\_\_

\_\_\_\_\_

Other philanthropic interests or gifts to OTHER organizations: \_\_\_\_\_

\_\_\_\_\_

What information indicates this prospect might be a candidate for gift planning follow up?

(e.g. updating estate plans, selling an asset, long-term loyal donor, expressed interest)

\_\_\_\_\_

\_\_\_\_\_

My commitment (please check all that apply):

\_\_\_\_\_ I will arrange a meeting      \_\_\_\_\_ I will join in a meeting      \_\_\_\_\_ I will introduce you

\_\_\_\_\_ Please use my name when you contact prospect      \_\_\_\_\_ I'd like to discuss this prospect