**SOLICITATION PREP FORM**

DATE

PROSPECT NAME: CAPACITY RATING: INCLINATION RATING:

SPOUSE NAME: SPOUSE ATTENDING?

CONTACT INFO

STAFF/VOLUNTEERS ATTENDING:

MEETING DATE/TIME/PLACE

MEETING PURPOSES:

RECOMMENDED ASK AMOUNT/PURPOSE:

RECENT CULTIVATION/SOLICITATION HISTORY:

CAMP BACKGROUND: (Camper, CIT, Counselor, Staff, Volunteer, Board, Parent, Grandparent)

CAMP PERSONAL CONNECTIONS/INFLUENCERS:

CAMP GIVING HISTORY:

FIRST: AMT/PURPOSE/DATE

LAST: AMT/PURPOSE/DATE

LARGEST: AMT/PURPOSE/DATE

OTHER SIGNIFICANT GIFTS/OUTSTANDING PLEDGES

PERSONAL INFORMATION

OCCUPATION

BUSINESS TITLE

BUSINESS ADDRESS

EDUCATION

CHILDREN/GRANDCHILDREN

WEALTH INDICATORS

Real Estate

Stockholdings

Business Ownership

Salary

Other Known Assets

Family Foundation

KNOWN PHILANTHROPY

VOLUNTEER INTERESTS

TEMPLE AFFILIATION: