

## **Major Donor Prospect Checklist**

Use this question checklist to determine major donor cultivation prospects

- ☐ What are the prospect's interests?
- ☐ How much have they previously contributed to your organization?
- ☐ What is the largest gift they have ever given to your organization?
- ☐ When was the last time they contributed to your organization?
- ☐ What is the largest gift they have ever given to any organization?
- ☐ Who on the Board or staff could be helpful with cultivating the solicitation?
- ☐ Do they give individually or through their company or family foundation?
- ☐ Do they have a philanthropic fund with a local foundation? If so, how large is their fund?
- ☐ Are they potential candidates for estate planning and/or deferred giving?
- ☐ Who are their key financial advisors?
- ☐ Have they recently come into wealth, sold a business or inherited significant resources?
- ☐ How financially secure is their business?
- ☐ Do they have a loved one who may be appropriate for memorializing or distinguishing with an honorarium gift?
- ☐ Does someone within your organization have an established relationship with the prospect which would be supportive of the solicitation?
- ☐ Would the prospective donor raise any issues relative to the solicitation?
- ☐ What would be the best setting to conduct an initial meeting?
- ☐ How much could you reasonably ask them to consider as a gift?
- ☐ What information, materials, hand-outs or visuals would be helpful to inspire a particular prospect?