# Confidential Benefactor Profile

Reference ID:

Last Updated:

By:

## Benefactor

1. Name Nickname:

Title

2. Company name

3. Height Weight

Outstanding physical characteristics

(Examples: balding, great condition, arthritis, severe back problems, etc.)

## Education

7. High school and year

8. College

Graduated when Degree

9. College honors

College fraternity or sorority

Sports

Extracurricular college activities

10. Advanced Degrees

11. If benefactor didn't attend college, is he/she sensitive about it?

What did they do instead?

12. Military service

## Family

13. Marital status Spouse's name

14. Spouse's education:

15. Spouse's interests/activities/affiliations

16. Spouse's feelings toward More To Life

17. Does spouse have significant input in decision making?

18. Wedding anniversary

19. Children, if any, names and ages:

20. Children's education

21. Children's interests (activities, hobbies, problems, etc.)

## Business Background

22. Career profile

23. Business affiliations

24. Type of business

25. Any "status" symbols in office?

26. Professional or trade associations (Offices or Honors in them)

27. Any mentors?

28. What is his/her long-range business objective?

29. What is his/her immediate business objective?

## Special Interests

30.Personal Honors

31. Clubs and service clubs (Kiwanis, Country Club, etc.)

Politically active? Party

Importance to benefactor

33. Active in community?

34. Religion Active?

35. Highly confidential items NOT to be discussed with benefactor (for example, divorce, member of AA, etc.

36. On what subjects (outside of business) does benefactor have strong feelings?

## Lifestyle

37. Medical history (current condition of health)

38. Does benefactor drink? If yes, what and how much?

39. Does benefactor smoke? If no, object to others?

40. Favorite places for breakfast

Lunch

Dinner

41. Favorite items on menu for breakfast

Lunch

Dinner

42. Does benefactor object to having anyone buy his/her meal?

43. Hobbies and recreational interests?

What does benefactor like to read?

44. Vacation habits

45. Spectator-sports interest: sports and teams

46. Kind of car(s)

47. Conversational interests

48. What adjectives would you use to describe benefactor?

49. What do you feel is benefactor's long-range personal objective?

50. What do you feel is benefactor's immediate personal goal?

## The Benefactor and More To Life

51. Did benefactor attend a Weekend? When/City

Who was the Trainer?

What does he or she remember most about the Weekend?

52. Has benefactor attended other More To Life courses since?

Which ones/when

Which have been most impactful and how

53. Does benefactor feel any commitment to More To Life?

Others?

Who/What?

54. What are the key issues as benefactor sees them?

55. What are the priorities of the benefactor

56. What are benefactors long-range More To Life objectives?

57. What are benefactors immediate More To Life objectives?

58. More To Life associations

59. Any people benefactor does not care for at More To Life and why

60. Benefactors interests/Areas of support at More To Life (trainer development, marketing, new courses, technology, scholarships, etc.)

61. Additional notes

## Benefactors Financial Situation

62. Estimated Income

63. Assessed Value of Home

64. Stock/Stock Options

65. Net Worth

66. Gift record - Total - $ Pledge Balance

67. KFS Annual Pledge - $ KFS Since

68. Past Areas of Support:

69. Current Areas of Support:

70. Benefactor rating:

71. Status of More To Life in will

## Recommended Approach & Next Steps