**FullName**

|  |  |
| --- | --- |
| **Account Name:** AccountName | **Primary Contact:** PrimaryContact@checkbox |
| **Informal Greeting:** Account.InformalGreeting | **Formal Greeting:** Account.FormalGreeting |
| **Date of Birth:** Birthdate | **Program Participant:** ProgramParticipant |
| **Home Phone:** HomePhone | PrimaryStreet |
| **Cell:** MobilePhone | PrimaryCity**IF PrimaryCity**, **ENDIF**PrimaryState PrimaryZip |
| **Email:** Email |  |

**AffiliationsIF Affiliations:Count <= 0:** No Affiliations on file **ELSE** **Primary Affiliation:** **PrimaryAffiliation**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Organization* | *Role* | *Status* | *Start Date* | *End Date* | *Notes* |
| **TableStart:AffiliationsOrganization** | **AffiliationsRole** | **AffiliationsStatus** | **AffiliationsStartDate** | **AffiliationsEndDate** | **AffiliationsDescTableEnd** |

**ENDIF**

**RelationshipsIF Relationships:Count <= 0:** No Relationships on File**ELSE**

|  |  |  |  |
| --- | --- | --- | --- |
| *Related Contact* | *Relationship* | *Status* | *Notes* |
| **TableStart:RelationshipsRelatedContact** | **RelationshipType** | **RelationshipStatus** | **RelationshipDescTableEnd** |

**ENDIF**

**Giving Information**

**Account Owner:** **AccountOwner  
Account Membership Level:** **AccountLevel**

|  |  |  |
| --- | --- | --- |
| **iWave Score:** **iWaveScore** | **Capacity:** **iWaveEstCapacity** | **LegacyCircle:** **HasBequestGift@checkbox** |
| **Lifetime Giving:** **TotalGiftAmount** | **First Gift Date:** **FirstGiftDate** | **Founding Member:** **FoundingMember@checkbox** |
| **Last Gift Date:** **LastGiftDate** | **Last Gift Amount:** **LastGiftAmount** | **Last Recurring Gift Date:** LastRecurringGiftDate |
| **Total Gifts Last 365 Days:** **TotalGiftsLastNDays** | **Total Gifts This Year:** **TotalGiftsThisYear** | **Total Gifts Last Year:** **TotalGiftsLastYear** |
| **Best Gift Year:** **BestGiftYear** | **Best Gift Year Total:** **BestGiftYearTotal** | **Last Related Business Gift:** LastRelatedBusinessGift |

**About this person**

**Contact Description:**

**ContactDescription**

**Account Description:  
AccountDescription**

**Additional Notes:**

**Recent ActivitiesIF Activities:Count <= 0**: No Activities on File**ELSE**

|  |  |  |  |
| --- | --- | --- | --- |
| *Subject* | *Status* | *Date* | *Assigned To* |
| **TableStart:ActivitiesSubject** | **ActivitiesStatus** | **ActivitiesDate** | **AssignedToTableEnd** |

**ENDIF**

**Recent CampaignsIF Campaigns:Count <= 0**: No Campaigns on File**ELSE**

|  |  |  |
| --- | --- | --- |
| *Campaign Name* | *Status* | *Date of Campaign* |
| **TableStart:CampaignsCampaignName** | **CampaignStatus** | **CampaignDateTableEnd** |

**ENDIF**

**Program EngagementsIF ProgramEngagements:Count <= 0**: No Program Engagements on File**ELSE**

|  |  |  |  |
| --- | --- | --- | --- |
| *Program* | *Role* | *Stage* | *Start Date* |
| **TableStart:ProgramEngagementsProgramName** | **ProgramEngagementRole** | **ProgramEngagementStage** | **ProgramEngagementStartDateTableEnd** |

**ENDIF**