

RESEARCH TIPS: How to do some sleuthing for yourself (no cost resources)

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FIRST STOP

Start with your organization's information.

- Do you have integrated wealth screening tools with your CRM?
- Have you previously researched this individual? Or, has anyone on your team?

GENERAL (CONTACT INFORMATION)

- Phone numbers: <https://www.whitepages.com/> (for both business and residential listings).
- Validating email address: [Email Validation - Validate Email Address For Free With Our Validator](#)

BIOGRAPHICAL SOURCES

General Search Tips

- Use quotation marks around a name to limit the number of hits and get more accurate results.
- Try a name with a middle initial and without.
- Also, search nicknames.
- Research the spouse if there is one.
 - Try the spouse's name on its own but also in combination with the prospect's name. Often, you will be cultivating a couple, not just one individual.
 - Even if the approach is happening with just one part of the couple, researching the spouse will give a better sense of the household wealth and philanthropic interests.

PROFESSIONAL INFORMATION

Company Web Sites

- If you know where your prospect works or where he/she is on a corporate board, then the company web site can be one of the best places to find a bio.
 - Look for a link to the management team (often under “About Us”).
 - Or look for a button that says “Investor Relations” and it often will link to a management team list.
 - Also you can click the “Site Map” button and look for something applicable.
 - Or if there is a search box for the site then you can put the prospect’s name in here.

LinkedIn

- Sign up with your own account, which may mean more information is available to you depending upon established settings.
- Use the advanced search feature for self-disclosed professional information (sometimes professional history) and often education.

Businessweek/Bloomberg

- Search for prospect names and Businessweek or Bloomberg (for example), may return a solid professional bio.

ZoomInfo

- [Browse ZoomInfo's database](#)
- Search by a person’s name to find biographical information.
- It sometimes finds board affiliations in addition to employment information.
- Some free information available, more with log on, and even more with a paid subscription

Forbes

- If your prospect is an executive or on the board at a public company, you can sometimes find a bio here and, at times, compensation information.
- Well known for Wealth lists of all sorts.
- If your prospect is high net worth, it is worth checking various Forbes lists.

COMPANY INFORMATION

For larger companies

- Spend some time on the company’s site to find general information about the company, recent press releases, and sometimes information about their community engagement/philanthropy.
- Look at the “Site Map” and look for terms such as “corporate citizenship” or “community engagement”.
- Hoovers supplies a company description and often information on financials, employees, competitors, and recent news (free and paid services). [DNB Business Directory](#)

For smaller companies

- Secretary of State websites (search for State in which the company is located)
 - The amount of detailed information varies from state to state.
- [Manta - The Place for Small Business](#)
 - Manta.com bills itself as focusing on information on small companies. Remember that financial information for private companies tends to be self-reported by the company (usually through Dun & Bradstreet).

GIVING

- Google giving-related searches: name and gift; name and philanthropy; name and school(s) attended; name and annual report (remember to try variations on name by adding or removing middle initials, and try both spouses).
- **Guidestar.org**
 - Free login (must be set up)
 - You can search for information on foundations and nonprofits.
 - It will list the years for which they have IRS 990 tax forms available and you can click on the link to view the 990 document.
- **Foundation Center Tools**
 - The Foundation Center has some free offerings including a free 990 search page at [990 Finder | Research and verify nonprofits](#)
- **Foundation & Company Sites**
 - Several large foundations have their own web sites with detailed information about their giving.
 - It is worth a Google search for the foundation, especially larger organizations.
- **Foundations Not Found With the Above Tools**
 - Not all foundations are set up in a manner in which they are required to file a 990 tax form.
 - Some are funds established through another group such as a community foundation or a charitable gift fund, etc. In these cases, you will usually not be able to find asset information but can do a Google search to see if the name of the foundation appears in donor lists (to give a sense of the foundation's philanthropic interest areas).

REAL ESTATE/PROPERTY

- **Zillow.com**
 - No login required. Plug in address for an approximate or estimated market value of a property.
- **Assessment Information**
 - You can often find the county assessor's website.
 - The town and or county assessor website will provide the tax — or assessed — value of the property. It may also provide lots of additional helpful information that

may include the market value, a history of sales, and a description of the property. Tax (assessed) value and market value can be quite different.

POLITICAL DONATIONS

- **Federal Election Commission**
 - Simply enter a person's name to discover if any gifts are reported.
 - For more common names, try the advanced search, which will allow you to limit by state, zip code, employer and occupation.
- **Open Secrets**
 - Allows for different filters to be added to a search, and fairly easy sorting
 - Does not enable you to look directly at the FEC filing to confirm an address.
- **Check government website for state political donations**

PUBLIC COMPANY INSIDERS

The only people who are required by law to disclose their stock holdings are public company insiders. These are directors, top officers, and 10 percent shareholders of publicly traded companies. The good news is that, if our constituent is an insider, we can learn specific information. The bad news is that only a fraction of our constituency is likely to have insider status. Insiders are easy to research. There are several different websites you can search for insider data.

- Yahoo Finance
- J3 Information Services Group's Insider Reports tool.
 - On the home page, look for Quick Search, then enter your prospect's name into the Insider Reports box and click Go.
 - If no information comes back, your prospect is probably not an insider.

COMPENSATION AND SALARY INFORMATION TOOLS

- **Salary**
 - Glassdoor
- **Physician Salaries**
 - Look up various medical professional average salaries by specialty (information from more recent years can be purchased at a cost)
- **Attorneys**
 - Look up attorneys (verify that someone is an attorney, location, and often education)
 - If you know your prospect is a Partner (equity partner) at a law firm, you can Google search the name of the law firm and profits per partner.
 - This should result with specific information for larger firms.
- **Government employees' salaries are often reported:**

- These will most often not be our top prospects. However, those with leadership positions in government can earn well into the six figures.
- Fed Data Center
- State Salaries