



Catholic Alumni Partnership

Prospect Research 101

Fundamentals of Individual Prospect Reports



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PROSPECT RESEARCH CHEAT SHEET

Name

Home Address
 City, State, Zip
 Home Telephone

Business Name
 Address
 City, State Zip
 Business Fax
 Email Address

• Demographic Information:

- Name:
- Birth Date:
- Education:
 - Year of graduation from your school
 - College graduation, etc.
- Employment History:
 - Current employment
 - Position (duration)
 - Brief overview of company
 - Past employment
 - Positions held (and when)
- Spouse:
- Children:
- Other Family:

- Father:

• Philanthropic Interests/Giving:

- Summary of giving to your school (if applicable)
- Other organizations and institutions supported by the prospect
- Include dollar amounts (even if general, if available)

RECOMMENDED SOURCES

- Google search
 - Try full name (w/ and w/o middle initials) in quotations
 - Spouse’s name
 - Name + any known affiliations
- The Ultimates
- Whitepages.com
- Zoominfo.com
- Businessweek
- Hoovers
- Forbes
- New York Times & Wall Street Journal
- Local Newspapers

- Guidestar.com
- 990’s
- Google search
 - key words such as “gifts” or “donations” “annual report” “philanthropy” “donors”
 - Annual Reports
- Check alumni associations and schools for information on giving history

Include year of gift (if available)

- Known affinities/trends in the prospect’s giving
- Foundation affiliations – If the prospect is on the board of a foundation, or has a family foundation, include background information

- **Board Affiliations:**

- Position, name of organization and dates in office (if available)
- Include both corporate and non-profit boards

- **Former Board Affiliations:**

- Position, name of organization and dates in office (if available)
- Include both corporate and non-profit boards

- **Select Political Contributions:**

- 2009 Election Cycle:
 - Name of campaign, party & amount donated
- 2007-2008 Election Cycle:

- **Honors, Awards and Memberships:**

- Any awards or forms of recognition the prospect may have received that are pertinent (e.g. an award in their field of specialization)
- Involvement in any organizations/ civil society groups, other than board involvement

- **Hobbies and Interests:**

- Other information on hobbies, interests, or the like

- **Miscellaneous**

- Businessweek
- Bio on prospect from their corporate website
- ZoomInfo
- Google search
 - Can use key words such as “trustee” or “board” or “director” paired with the prospect’s name

- CQ Money Line
- Google search
- Opensecrets.org
- www.campaignmoney.com
- www.fec.gov

- Google search
 - Sometimes can find through a general search
 - May also appear in bio (e.g. on a company website)

- Financial Information:

- Known Worth:
- Compensation & Stock Holdings:
- Known Real Estate Holdings:
- Other Known Assets:

- Fortune
- Forbes
- Dataquick
- Yahoo Real Estate
- Zillow.com
- Corporate Press Releases
- Yahoo! Finance
- SEC Forms
- Edgar

PROSPECT RESEARCH CHECKLIST

<p>PHONE & ADDRESS</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.theultimates.com <input type="checkbox"/> www.whitepages.com <input type="checkbox"/> www.cnada411.com <input type="checkbox"/> www.usps.com/zip4/ <p>REAL ESTATE/ASSESSMENT</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.bankofamerica.com <input type="checkbox"/> www.corcoran.com (NY) <input type="checkbox"/> www.domainia.com <input type="checkbox"/> www.pulawski.com <input type="checkbox"/> realestate.yahoo.com <input type="checkbox"/> www.zillow.com <p>INVESTIGATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.wdfi.org <input type="checkbox"/> www.biography.com <input type="checkbox"/> www.alumnifinder.com <input type="checkbox"/> www.zoominfo.com <input type="checkbox"/> www.specialissues.com/lol/ <input type="checkbox"/> www.forbes.com/lifestyle/ <p>INVESTIGATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.biography.com <input type="checkbox"/> www.zoominfo.com <input type="checkbox"/> www.forbes.com <input type="checkbox"/> www.zabasearch.com <input type="checkbox"/> www.searchsystems.net <input type="checkbox"/> www.ziggs.com 	<p>COMPANY RESEARCH</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.wsj.com <input type="checkbox"/> www.hoovers.com <input type="checkbox"/> www.marketwatch.com <input type="checkbox"/> www.businessweek.com <input type="checkbox"/> www.morningstar.com <input type="checkbox"/> www.manta.com <p>COMPANY VALUATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.globalbx.com <input type="checkbox"/> www.bizbuysell.com <input type="checkbox"/> www.bizstats.com <input type="checkbox"/> www.inc.com <input type="checkbox"/> www.bvmarketdata.com <p>PEOPLE SEARCH - OCCUPATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> firms.findlaw.com -Lawyers <input type="checkbox"/> www.wisbar.org-Lawyers <input type="checkbox"/> www.martindale.com-Lawyers <input type="checkbox"/> www.ada.org-Dentist <input type="checkbox"/> www.ama-assn.org-Doctor <p>FINANCIAL INFORMATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.secinfo.com <input type="checkbox"/> www.freeEDGAR.com <input type="checkbox"/> finance.yahoo.com <input type="checkbox"/> www.forbes.com <input type="checkbox"/> www.secinfo.com <input type="checkbox"/> www.vfinance.com <input type="checkbox"/> www.fundrace.org 	<p>POLITICAL DONATIONS</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.campaignmoney.com <input type="checkbox"/> www.fec.gov <input type="checkbox"/> www.moneyline.cq.com <input type="checkbox"/> www.opensecrets.org <p>PHILANTHROPY</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.philanthropy.com <input type="checkbox"/> www.nonprofit.about.com <p>FOUNDATIONS</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.guidestar.com <p>PROSPECT SITES</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.aprahome.org <input type="checkbox"/> www.internet-prospecter.org <input type="checkbox"/> www.lambresearch.com <input type="checkbox"/> www.uvm.edu/~prospect <p>SALARY/WAGES</p> <ul style="list-style-type: none"> <input type="checkbox"/> www.salary.com <input type="checkbox"/> careers.wsj.com <input type="checkbox"/> aflcio.org/corporatewatch <p>OTHER ASSETS</p> <ul style="list-style-type: none"> <input type="checkbox"/> registry.faa.gov <input type="checkbox"/> www.landings.com
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