***TEMPLATE: To be completed by Prospect Research and Prospect Manager and returned to admin support.***

*Please take the time to proof and edit your information for content, grammar, and formatting. Remember, this document is for the President and should be as close to print-ready as possible when you submit it. Thank you!*

**Confidential Briefing & Talking Points**

**Prospect Name(s):** Name

**Preferred Contact:** [ ] Telephone OR [ ] Email

PLEASE INSERT CURRENT DONOR PHOTO,

IF AVAILABLE

**Contact Information:** List all prospect contact info, including

mailing address, phone, and email

**Affiliation**:

**Lifetime Giving**:

**Meeting Location:** Location

**Date/Time:** Date/Time

**Staff Attending:** Staff Name(s)

**Staff On-Call:** Staff Name and Phone #

**Meeting Logistics:** Info on meals, driving/parking instructions, etc.

**PURPOSE OF MEETING/CONTACT**

* *What is the primary purpose of this meeting, call or other point of contact? (Introductory Meeting? Stewardship? Cultivation? Other?*)
* *Briefly describe the two main desired outcomes that will have made this meeting a success (e.g. donors feel appreciated and understand the impact of their giving, donors leave the meeting with a clear understanding of a certain project, etc.).*

**Relevant Background**

* *Has this donor previously met with the President? (When? Where? Formal or Social?)*
* *Has this donor recently met w/ other leadership? (Who? When? Where?)*
* *Provide any details/ background for this donor that will be relevant to this meeting/contact.*
	+ *Employment*
	+ *Education*
	+ *Family*

**Talking Points**

1.

2.

3.

**Potential Objections and/or Subjects to Avoid or be Prepared for**

1. *List potential objections that may be roadblocks to accomplishing desired outcome(s).*
2. *Briefly list any topics, issues, etc. that should be avoided during this meeting (and why).*

*Note: Highly confidential information should be shared in the verbal briefing with President only.*

**Donor’s Areas of Interest**

* *What are the specific areas of interest and/or giving? (Campus(es); Department(s); program(s); etc.)*
* *Is the individual/organization an active principal gift prospect? If applicable, please provide a general summary of the strategy/solicitation.*