

Research Profile Prompt Guide

Example Prompt for Research Profile:

Conduct a research profile on [Prospect Name], based in [City, State].

Please use the Prospect Research Profile Template provided in the Project Files as the structure for your response.

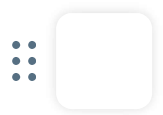
Here's what I know so far:

- [Known detail 1]
- [Known detail 2]
- [Known detail 3]

Please include:

- Current role and organization
- Location
- Education
- Board memberships
- Past employment
- Philanthropic giving
- Wealth indicators (e.g., real estate, businesses, net worth)
- Connections (e.g., known associates, family, mutual introductions)
- Political donations
- Relevant articles, quotes, or family details

Use publicly available sources such as LinkedIn, company websites, news articles, and other reputable sources to fill in the template.



Follow-Up Prompts for Prospect Research

To Dig Deeper:

- What is the prospect's connection to specific regions or cities (e.g., Cleveland, Miami)?
- Are there any recent news articles or press releases about the prospect?
- Has the prospect been involved in any major philanthropic gifts recently?
- Does the prospect have any family members (spouse, children, siblings) with known philanthropic activity or affiliations?
- Does the prospect own real estate or business interests in key locations (e.g., Miami, Palm Beach, New York)?
- What events, galas, or conferences does the prospect attend?
- Are there any mutual connections between the prospect and your organization's board or staff?
- What causes or interests does the prospect seem to support (e.g., arts, environment, education)?

To Verify Accuracy:

- Can you cross-reference the prospect's board memberships with official websites or IRS filings (e.g., Guidestar, Candid)?
- Are there discrepancies between what was found in one source and another (e.g., different company titles, conflicting locations)?
- Have you confirmed the prospect's current employment status via LinkedIn or press releases?
- Does the prospect have any political donations listed on FEC.gov or OpenSecrets.org? If so, are the names and addresses consistent?
- Have you verified the prospect's real estate holdings through public property records?
- Do they appear in philanthropic directories (e.g., DonorSearch, WealthEngine, iWave)?

