

# Alumni Relations Prospect Referral Template

## Instructions

Alumni relations professionals often meet more potential donors than development staff and are therefore in a perfect position to refer prospects to the development office. Give this form to alumni relations staff to help them track and qualify the alumni they meet. Upload this document to the advancement office's intranet to streamline the referral process.

### Prospect Referral Form

Your Name \_\_\_\_\_

Please fill out as much as you recall from meeting this prospect

Constituent name: \_\_\_\_\_ Class Year: \_\_\_\_\_

Home City, State: \_\_\_\_\_ Employer: \_\_\_\_\_

- ☐ Business ownership (listen for: type of business, years in business, sales trends, recent sale)
- ☐ Career Path (promotions, title)
- ☐ Board Involvement (business or civic)
- ☐ Secondary homes
- ☐ Investment Properties (commercial, apartments, farms, vineyards)
- ☐ Family Foundation
- ☐ Major Philanthropic Gifts to Other Organization
- ☐ Vacation Spots
- ☐ Yachts, Private Airplanes,
- ☐ Collections (art, jewelry, antiques)
- ☐ Country Club Membership
- ☐ Hobbies (show horse, wine collecting, cars, sailing)
- ☐ Boarding Schools for Children
- ☐ Hired Help (nannies, chauffeur, interior decorator)
- ☐ Other

Select one or more of the above and elaborate below with as much detail as possible:

Sources: Adapted from materials provided by Marquette University; EAB interviews and analysis.