# PROSPECT RESEARCH BRIEFING

## Confidential

**DATE: 3/28/2021 Prepared By: April Jones - MGO**

**NAME: Sue Nomique**

**Home Address: 223 West 45th Ave. Anytown USA**

**Business Address: N/A**

**Email Address: SueN@email.com**

**Phone #: 222-225-2525**

**Relationship to <Station>: Past Board Member, current donor**

**BUSINESS AFFILIATIONS**

**Current Employment: Retired**

**Career History: Former owner of Sue’s Events**

**Other Business Affiliations: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Honors/Awards: 2010 Anytown Business Woman of the Year**

**Boards, Community Service, Professional Affiliations**: Ballet Board Member, Ran for City Council in 1999, Chair of the Anytown Chamber of Commerce

**BIOGRAPHICAL INFORMATION**

**Birthdate & Hometown: 4/14/1947 Anytown USA**

**Education: MBA from State Univ**

**Family: Husband Fred, died in 2017 Daughter Laura attends events and philanthropy meetings with Sue**

**Political Affiliation: Ran as a Republican in 1999 unknown affiliation currently**

**Interests/Hobbies/Creative works:** Plays cello, grows orchids

**Interest in Public Media**: Been a listener since early days, served 2 terms on the board

**Interest in Journalism and/or Classical Music**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PHILANTHROPIC ACTIVITY**

**Community/Social Affiliations: Gives widely around town at around $1,000 level. Majority of larger gifts to the ballet.**

**Giving History to <Station>:**

Years Giving: 15

First Gift: 2006

Largest Gift: $2,500

Most Recent Gift: $500

**Foundation Affiliation Giving: (may be attached)**

Year Amt Organization

Year Amt Organization

Year Amt Organization

**Personal Giving History: (may be attached)**

Year Amt Organization

Year Amt Organization

Year Amt Organization

**Recent/Significant Political Contributions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**FINANCIAL INFORMATION**

**Real Estate: Owns buildings that house Sue’s Events, sold the company kept the real estate. Owns a $3.3 home**

**Stock: unknown**

**Income Estimation: unknown**

**Other Indications of Wealth: Business sale was for $15M, Commercial real estate holdings are significant and generate monthly income.**

**Wealth Screening Estimated Gift Capacity: $1,000,000**

**NOTES**: Sue made a $500,000 pledge to the ballet and is in her last year of payments. This would be an ideal time to put together a proposal for the station when she again has capacity to make a larger pledge.

On a prospect ranking sheet, Sue, would score:

**1. Financial (modify to fit circumstances)**

0 = $1,000 - $5,000

1 = $5,000 - $10,000

2 = $10,000 -$25,000

3 = $25,000 - $50,000

4 = $50,000+

**2. Interest and Connection**

0 = No involvement with you station, or other public media station

1 = Membership level gift or event attendee

2 = Sustaining donor or multi-annual donor, event attendee, volunteers on a board or committee, positive opinions of your station

3 = Continuous donor, volunteer, gifts of $1,000+, strongly personally identifies with station and mission

4 = Active volunteer, passionate about mission, advocate for station in the community, previous major gift donor

A 4/4 = an ideal prospect. The assigned MGO should focus a good deal of time with Sue getting to know her and her philanthropic priorities and work to create an offer for her that will engage her and her daughter to make a major gift.