

****CONFIDENTIAL****
Individual Research Profile

NAME

Address
Telephone
Fax
Email

CAREER BACKGROUND

NON-PROFIT AFFILIATIONS

CIVIC / POLITICAL / RELIGIOUS AFFILIATIONS

EDUCATION

PERSONAL BACKGROUND

Born:
Spouse:
Children:
Parent(s):
Sibling(s):
Hobbies:
Awards:

WEALTH INDICATORS

Annual Income:
Securities:
Real Estate:
Other:

RECENT CONTACT

CONNECTIONS

GIVING SUMMARY