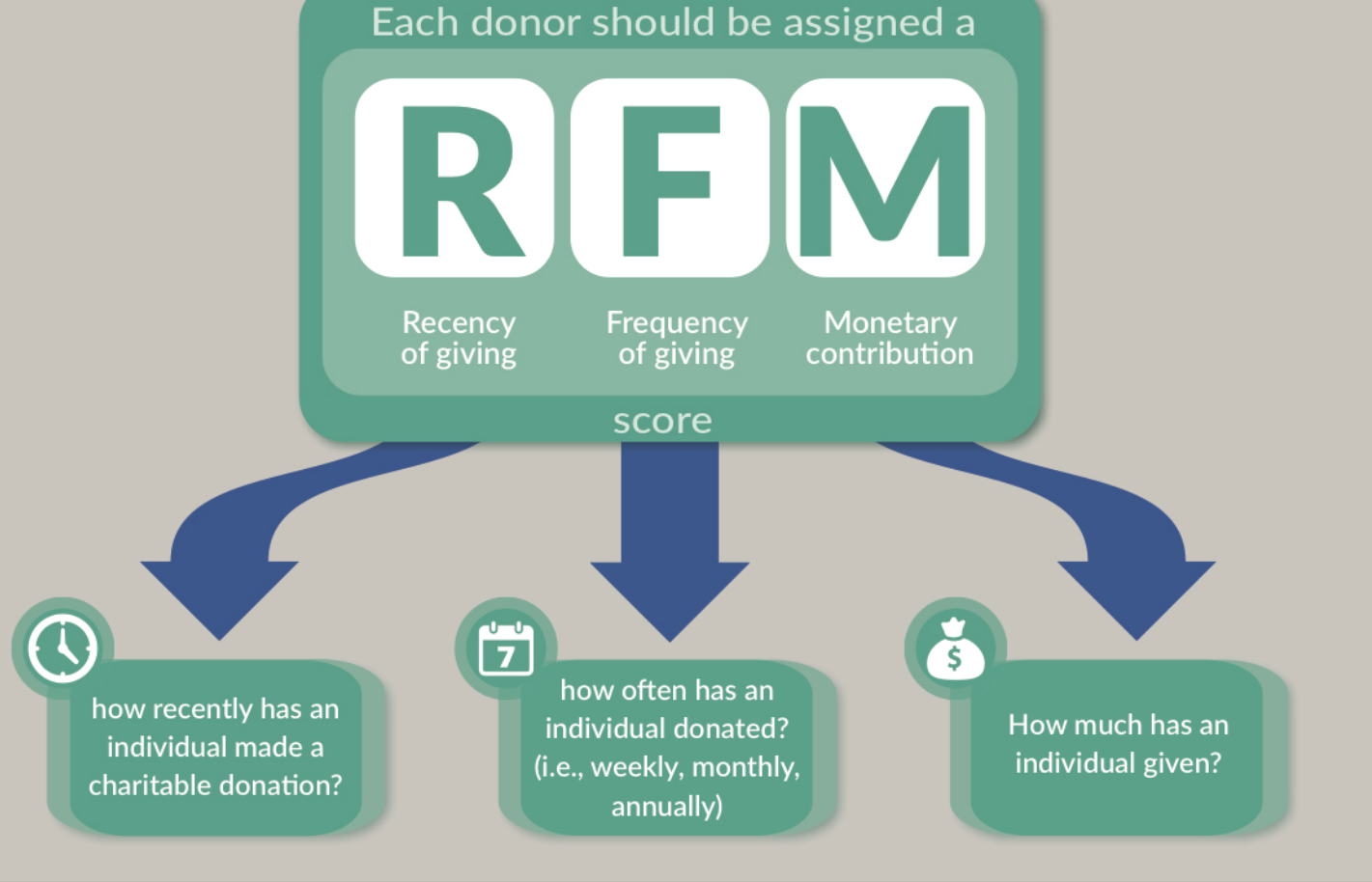


# 7 types of donor data that need to be part of your next WEALTH SCREENING

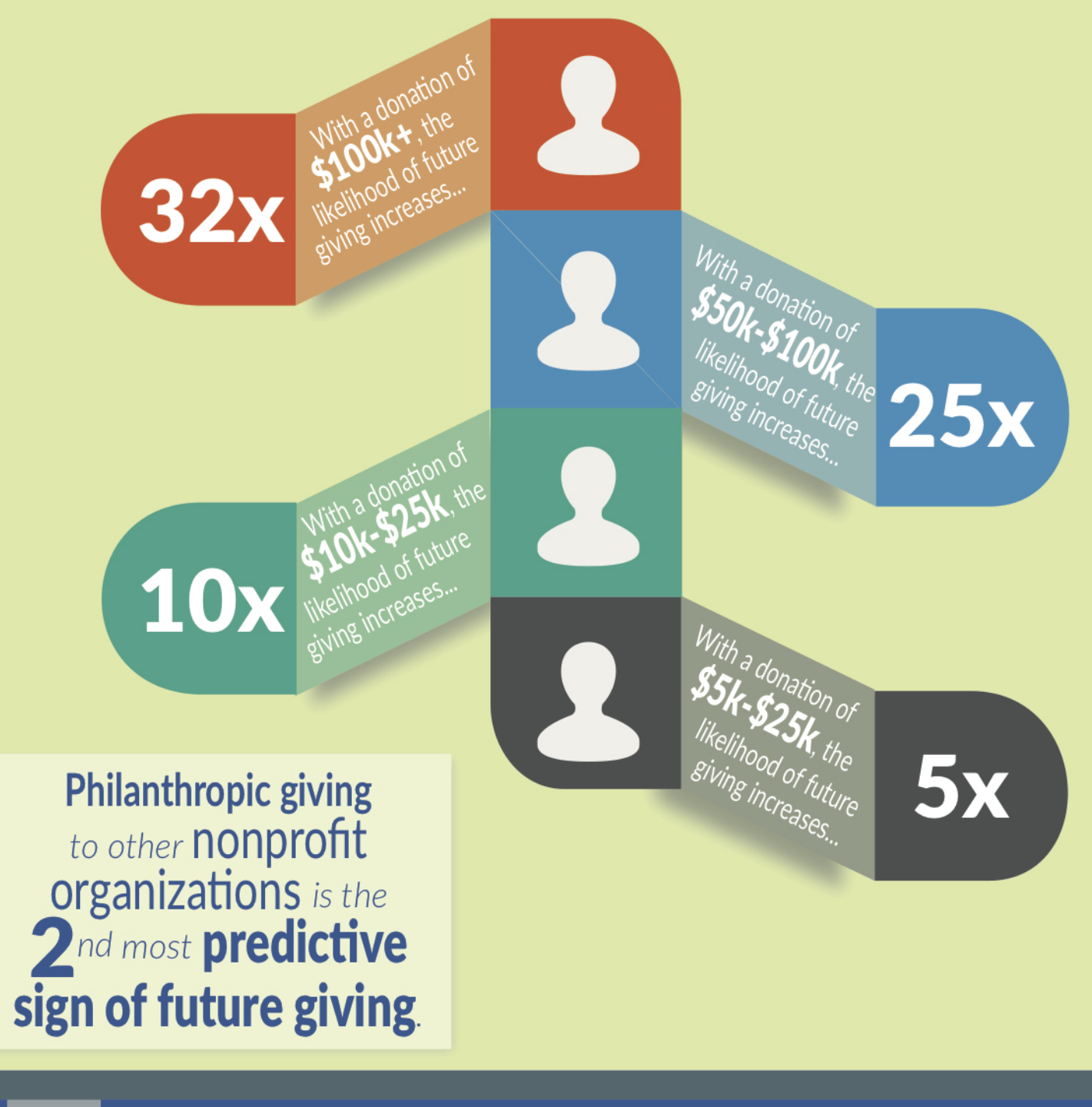
## Previous Charitable Donations to Your Nonprofit

“The donors most likely to donate in the future are those who have **previously donated**.”

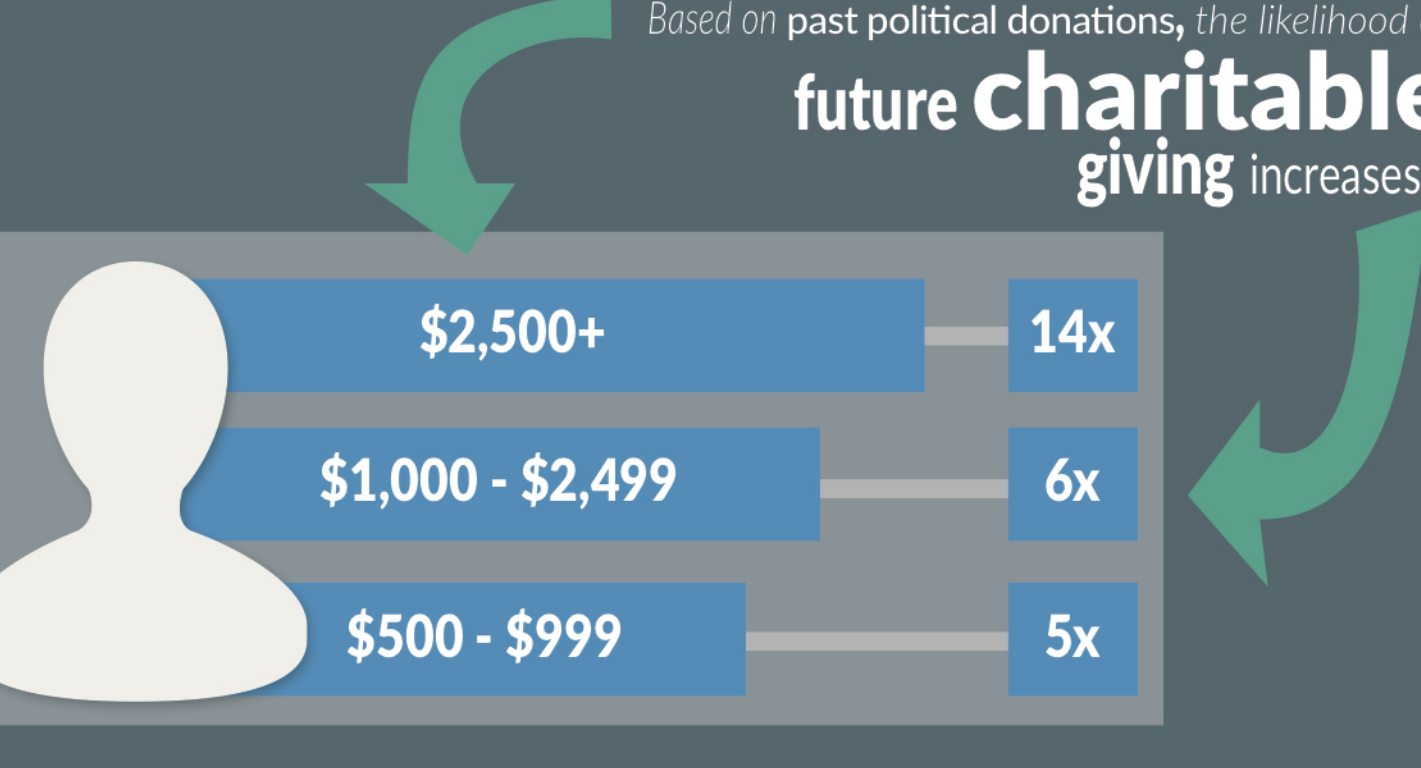


**78%** of planned giving donors gave **15** or more gifts to the nonprofits *named in their wills* during their lifetimes.

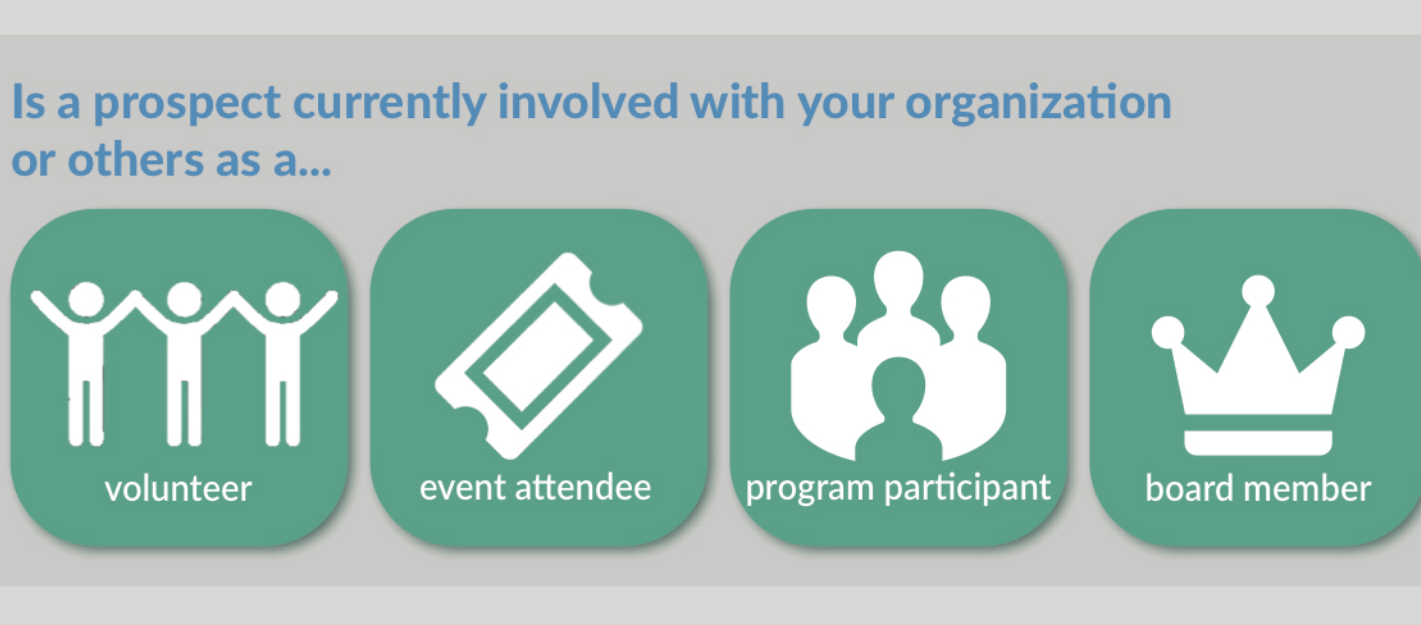
## Donations to Other Nonprofits



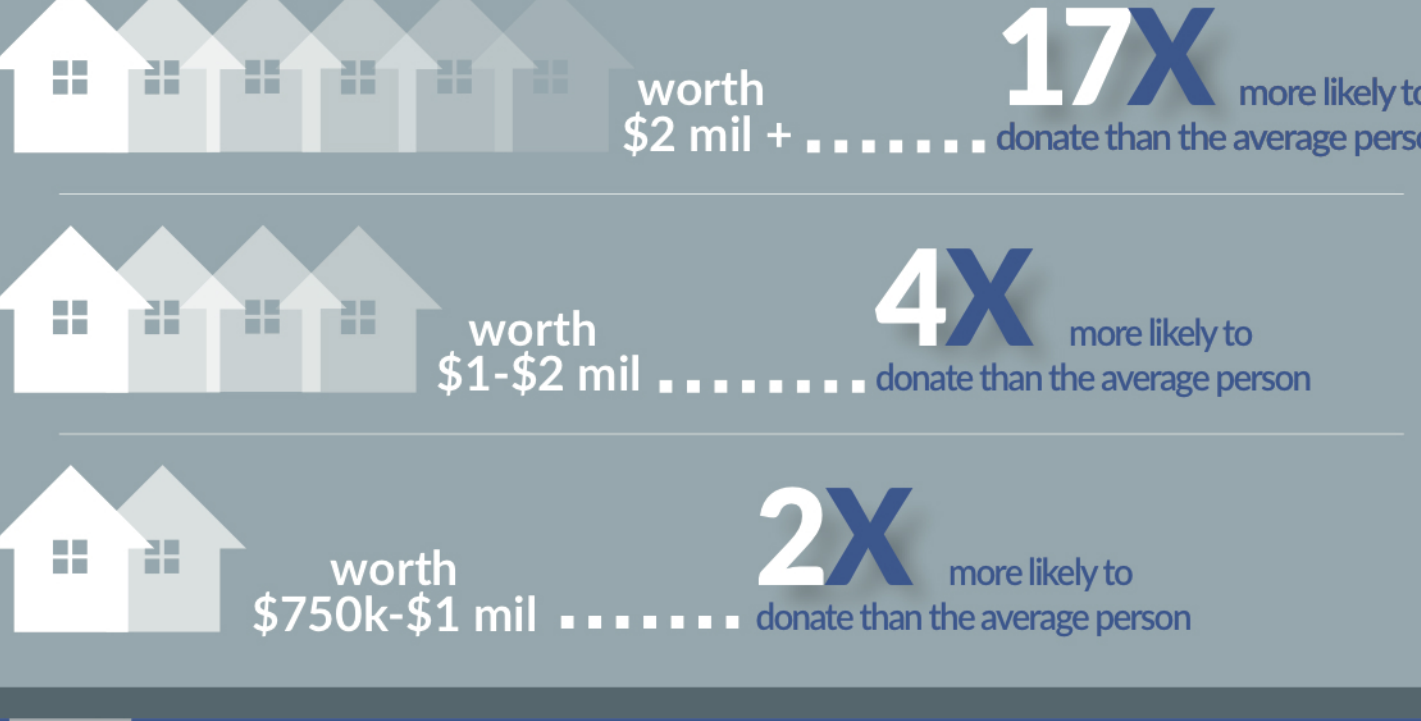
## Political Giving



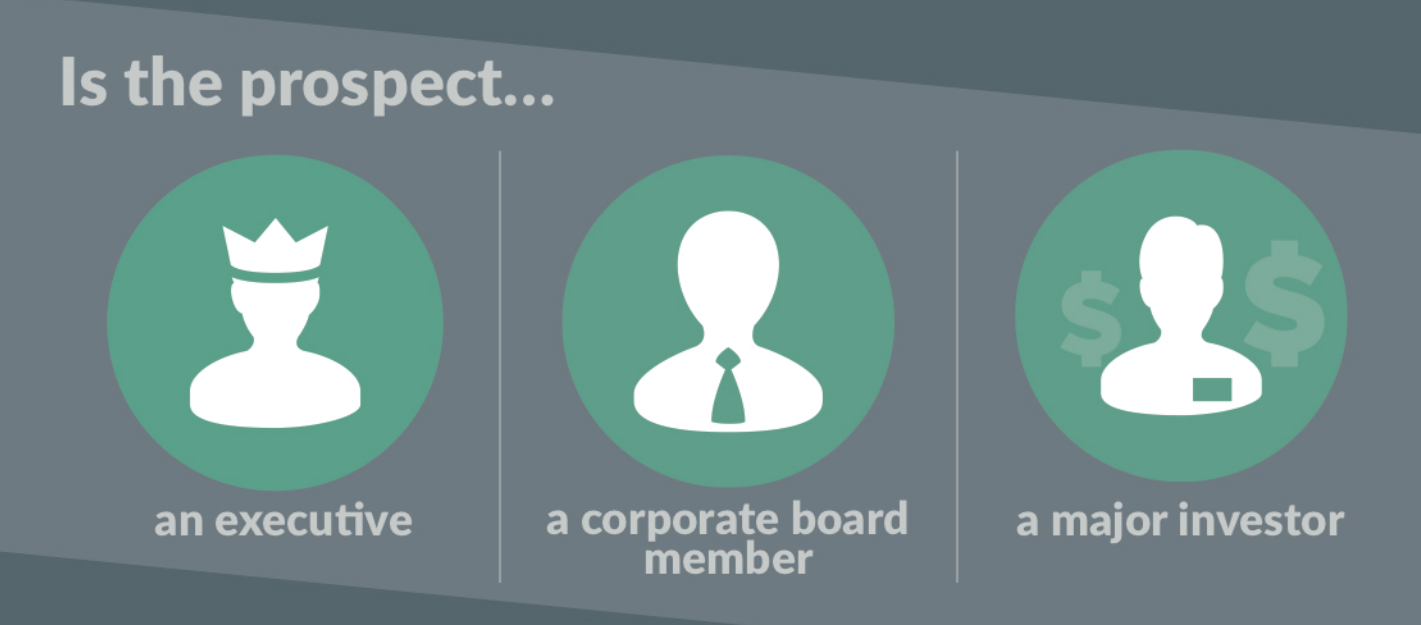
## Nonprofit Involvement



## Real Estate Ownership



## Business Affiliations



## Stock Ownership of Publicly Owned Companies

The U. S. Securities and Exchange Commission (SEC) requires “insiders” of publicly held companies to report when they buy or sell company stock or exercise stock options.

**Who is an insider?** defined by the SEC

- officer of a public company
- director of a public company
- individual entity owning 5%+ of any class of company shares

**Why is stock ownership important?**

**1** indicates donor affluence

**3** potential to donate stock

**2** major donor connections

**4** corporate grant opportunities



www.donorsearch.net | info@donorsearch.net | 410 -670 -7880

Sources:

<http://www.donorsearch.net/prospect-research-statistics/>  
<http://www.donorsearch.net/our-databases/>  
 Survey by Lawyers.com and the CAE VSE survey