

Pre Visit Check list

Donor Name (s):

Donor Gift History:

Largest Gift

Most Recent Gift

Average Gift Size

Number of gifts

Connection/Involvement with organization:

Areas of interest in our organization:

What do I want to accomplish on the visit?:

What do I want to learn about the donor?:

What do I want the donor to learn about us?:

What does donor want to accomplish on the visit?:

What is next step? Where do we go from here?: