



**CONFIDENTIAL**

**SOLICITATION BRIEF**

**Prospect:** John & Kelly Rutgers  
9 Rogers Lake Road  
Simsbury, CT.  
Home Phone: 888-555-5555

**Business:** Bell and Powers  
1 Corporate Way  
Stamford CT 06902

**WE Screening** P2G Score: 1-0  
Gift Capacity Rating: 1  
Gift Capacity Range: 50,000  
Influence: 1  
Inclination: 1

**Solicitation Team:** Exec Dir Joseph Leader, Board member Susan Connecion

**Gift Request:** \$5,000

**Solicitation Date:** November 30<sup>th</sup>, 2014

**GIVING HISTORY BACKGROUND**

12/3/2001 \$35.00 unrestricted  
12/3/2002 \$35.00 unrestricted  
12/3/2004 \$105.00 event  
12/3/2004 \$350.00 unrestricted  
12/3/2006 \$350.00 special fund  
12/3/2006 \$500.00 unrestricted  
12/3/2007 \$500.00 unrestricted  
12/3/2008 \$500.00 unrestricted  
12/3/2009 \$500.00 unrestricted  
12/3/2010 \$500.00 unrestricted  
12/3/2011 \$1000.00 special fund  
12/3/2012 \$1500.00 special fund



## **INDIVIDUAL / COMPANY BACKGROUND**

Invited as a guest to the event in 2001

Met with Exec Dir for lunch end of 2002.

Wife is involved in local hospital and the women's club.

Husband owns his own small business, since 1959.

Has a friend on the organizations board.

Daughter married and living in Asia with her husband from Taiwan and her two children.

## **STRATEGY**

Invite Mr and Mrs to lunch with board member Susie Connecion and Exec Dir.

Share latest outcomes from special fund

Invite into conversation about new project

Following month, send details on project development with pictures.

Invite to project event

Susie to connect with prospect once monthly note, email, call, coffee.

Identify project interest

Invite to dinner with S Connecion and Exec Dir. Review project opportunities. Thank them for their past support. Highlight how project will change the organization and impact the clients. Ask for their investment.