



# 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**.

Each donor should be assigned a

# R F M

Recency of giving

Frequency of giving

Monetary contribution

score



how recently has an individual made a charitable donation?



how often has an individual donated? (i.e., weekly, monthly, annually)



How much has an individual given?

78%

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



## Donations to Other Nonprofits

32x

With a donation of **\$100k+**, the likelihood of future giving increases...



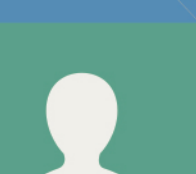
With a donation of **\$50k-\$100k**, the likelihood of future giving increases...

25x



10x

With a donation of **\$10k-\$25k**, the likelihood of future giving increases...



With a donation of **\$5k-\$25k**, the likelihood of future giving increases...

5x



Philanthropic giving to other nonprofit organizations is the **2<sup>nd</sup> most predictive sign of future giving**.



## Political Giving

Based on past political donations, the likelihood of

future **charitable giving** increases...



\$2,500+

14x

\$1,000 - \$2,499

6x

\$500 - \$999

5x

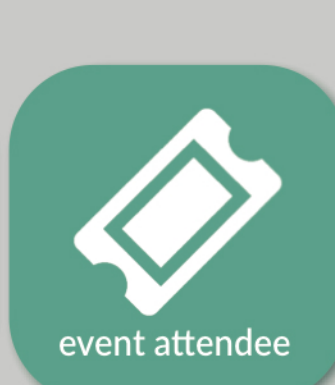


## Nonprofit Involvement

Is a prospect currently involved with your organization or others as a...



volunteer



event attendee



program participant



board member



## Real Estate Ownership



worth \$2 mil +

**17X** more likely to donate than the average person



worth \$1-\$2 mil

**4X** more likely to donate than the average person



worth \$750k-\$1 mil

**2X** more likely to donate than the average person



## Business Affiliations

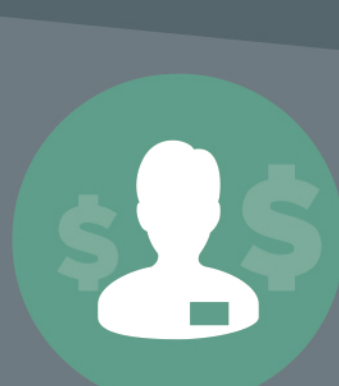
Is the prospect...



an executive



a corporate board member



a major investor



## 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
- 2 major donor connections
- 3 potential to donate stock
- 4 corporate grant opportunities



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Sources:

<http://www.donorsearch.net/prospect-research-statistics/>

<http://www.donorsearch.net/our-databases/>

Survey by Lawyers.com and the CAE VSE survey