

PENNINGTON & COMPANY

FUNDRAISING | CONSULTING | ALUMNI RELATIONS

CONFIDENTIAL Briefing Document

Donor Name:

Date and time of meeting:

Location: (include Zoom link, dial in, location detail here)

In attendance: Donor name, gift officer(s), volunteers

Solicitation Goal: Amount & specific sponsorship opportunity if any

Meeting Goal: (3-4 specific goals of meeting)

Organization History: (short bullet points on giving history, connection to organization)

Personal Bio:

- Career:
- Education:
- Family:
- Website/Socials links:

Speaking Points: (include speaking points from last meetings – especially significance of experience)

Ask: (Write out the specific ask so you can practice - include a prompt for silence)

Next Steps: (What are your planned steps, these may change based on the conversation)

Bringing: (list any collateral material or gifts that you bring to meeting so you do not duplicate in the future)