

Name _____ Request Date _____

Department _____

Phone _____ E-mail _____ Date Needed By _____
*Please allow at least 5 business days for completion. Emergency requests will be accommodated as the processing schedule allows.

Purpose _____
(What will this information be used for, i.e., mailing list, solicitation, newsletter, etc.)?

For ZIP Code Queries Starting ZIP Code _____ Radius in miles _____

Explanation of Request Criteria for the list (i.e., what defines the list and qualifies those on it?).
Please be as specific as possible (i.e., all of the alumni who have given donations since 1995).

Constituency Groups to INCLUDE (check those that the list will be based on)

- Individuals**
 - Inactive Constituents
 - Trustees
 - Faculty/Staff
 - Students
- Honor/Memorial
- Solicitors
- Parents
- Friends
- Deceased Constituents
- International Constituents
- Alumni
- Corporations
- Foundations
- Organizations
- All Groups

Specific Details to EXCLUDE (if not checked these attributes will be included)

- Invalid address** (constituents with no valid address)
- No telephone number** (constituents with no recorded phone number)
- No e-mail address** (constituents with no recorded e-mail)
- Solicit codes** (if this box checked, check the following boxes that are applicable)
 - Do not solicit
 - Do not contact
 - Do not mail
 - Do not call
 - Do not send newsletter
 - Only gives once per year

Other (describe) _____

Output (the information you want displayed in your report/list—check ALL that apply)

- ID (Raiser's Edge ID)
- First Name
- Salutation (This section relates to the salutations for a letter and the addressee for the outside of an envelope or piece of mail)
 - Joint (example Mr. and Mrs. Doe) *recommended for mailing lists
 - Individual (example Mr. Doe)
- Addressee
 - Joint (example Mr. and Mrs. John B. Doe) *recommended for mailing lists
 - Individual (example Mr. John B. Doe)
- Preferred Address
- Preferred Business Address
- Address (city, state and ZIP included)
- Home Phone
- Employer
- Assigned Solicitor
- Prospect Ratings (*be sure to specify which ratings)
 - Major Gift Likelihood
 - Wealth Point Ratings
 - Annual Gift Likelihood
 - Planned Gift Likelihood
 - Target Gift Range
- Giving History (summary)
 - Largest Gift
 - Last Gift
- Specific Date (from _____ to _____)
- Gift Types
 - Cash
 - Match
 - Soft Credits
 - Pledges
 - Gifts-In-Kind
 - Stock
- Additional (specify) _____

Heading *(What would you like the title to be?)*

Page numbers

Additional Details *(Special Instructions)*

Unless otherwise specified, your list will be sorted ALPHABETICALLY Other Sort Order _____
**BE SURE TO INCLUDE IF YOU WANT ASCENDING OR DESCENDING (i.e., descending pledge amount)*

File Format *(all lists will be created as an Excel spreadsheet unless specified otherwise)* Other File Format _____

Preferred Mode of Delivery _____

Requestor's Signature _____

All request forms should be sent to Rebecca Caldwell, Assistant Director of Advancement Services

Via campus mail — Allen S. Henry Building, 150 W. University Blvd., Melbourne, FL 32901-6975

Via e-mail caldwelr@fit.edu Via fax (321) 674-6150

For questions, please contact Rebecca Caldwell, (321) 674-6141 (caldwelr@fit.edu)