

**SAMPLE:** The information in this profile is fictitious and is a representation of data that we can provide. Actual profile data may vary based on the amount of information available.

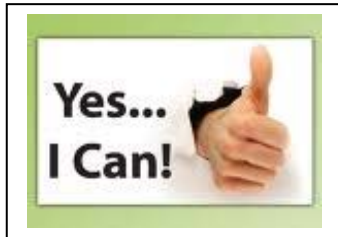
**CONFIDENTIAL**

January 1, 2011

Client Individual Profile Sample


**PROSPECT PROFILE: PROSPEROUS JOHN ANTHONY DOE**  
**PRESIDENT AND CEO OF YES I CAN!**

**Income Component (from Market Guide): \$4.4M**  
**Stock Component: \$2.6B**  
**Real Estate Component: \$11.7M**  
**Total Net Worth**  
**Ranked #207 in Forbes' 400 Richest Americans 9/27/10**  
**Total Estimated Giving Capacity over 5 years \$200M**



<b>1-2-1 RATING</b>	<b>High Capacity, Potential Interest - needs to be cultivated more</b>	
<b>AFFILIATION WITH CLIENT</b>	Responded to direct mail program	
<b>BORN</b>	September 27, 1950 in New Orleans, LA John will be 61 years old in September of 2011.	
<b>RESIDENCES(S) &amp; PHONE(S)</b>	<u>PRIMARY</u> 11 Centennial Drive Malibu, CA 90265 (310) 123-0000 (Approx. Value \$2.9M)  *see picture above on right  *Hualalai Home (pronounced ha-WAH-la-lye) is a 4,700-square-foot four-bedroom, four-and-a-half bath Hualalai residence overlooking the golf course and the ocean. Valued at \$8.75 million.	<u>SECONDARY</u> *c/o Hualalai Resort P.O. Box 121 Kailue-Kona, HI 96745 (808) 325-2510

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<p><b>HOBBIES/INTERESTS</b></p> 	<p>Plays sports, subscribes to magazines, enjoys family activities, cares about healthy living, researches investments, donates to causes, enjoys photography, cycling, is a major department store card holder and loves reading. Fluent in French.</p> <p>Currently training for Annual Fundraiser Fat Tire Fest in Castaic Lake, CA, October 17, 2010</p>
<p><b>BUSINESS ADDRESS &amp; PHONE(S)</b></p>	<p>Yes I Can, Inc.          3625 Winter Canyon Rd # 2          Malibu, CA 90265          (310) 456-2361          Fax: (310) 737-7194  <a href="http://www.yesican.com">http://www.yesican.com</a>          2009 Sales \$1.65B          Total Assets \$3.08B          Market Value \$5.35B</p> <p>Founded by motivational speaker and best-selling author John Doe. Mr. Doe is recognized as an authority on the psychology of leadership, negotiations, organizational turnaround, and peak performance. He has held leadership positions in such companies as I Think I Can, LLC, On My Way Corporation, I Thought I Could, Read All About Us Publishing, and Discover The Possibilities. He was also one of the founding strategists in the creation of the Presidential Summit for America's Dream.</p>
<p><b>FAMILY FOUNDATION</b></p>	<p><b>The John Doe Family Foundation</b>          9672 Via Excelencia, Ste. 102          San Diego, CA 92126-4573          Telephone: (858) 444-8030          Fax: (858) 536-5826  <a href="mailto:foundation@johndoefoundation.org">foundation@johndoefoundation.org</a>  <a href="http://www.johndoefoundation.org/">http://www.johndoefoundation.org/</a></p> <p>Established in 1998.          The foundation works to empower individuals and organizations to make a significant difference in the quality of life for people who are often forgotten: youth, the homeless and hungry, prisoners, the elderly, and the disabled.</p> <p>Year ended 12/31/09:          Assets: \$8,472,006 (market value)          Gifts received: \$16,830          Expenditures: \$2,065,537          Total giving: \$1,749,303          Qualifying distributions: \$1,749,303          Giving activities include:          \$1,749,303 for 30 grants (high: \$1,012,236; low: \$98)          Limitations:          Applications not accepted.          Giving primarily in CA; some giving in HI</p>



<b>ADDITIONAL INFORMATION</b>	<ul style="list-style-type: none"><li>• 2000 - Named the Alumnus of the Year of the Yale School of Management</li><li>• 2005 - Nominated for the National Entrepreneur of the Year award by Arthur Young</li></ul> <p>For a number of years, John Doe has served as an advisor to business leaders. A recognized authority on the psychology of leadership, negotiations, organizational turnaround, and peak performance, he has been honored for his strategic intellect and humanitarian endeavors. His nonprofit John Doe Foundation provides assistance to the elderly and inner-city youth, health care for the homeless, books for prisoners, veteran’s causes, etc. Doe has directly impacted the lives of nearly 10 million people from 80 countries with his best-selling books and audiotape products, public speaking engagements, and live appearances.</p> <p>Committed to helping individuals transform the quality of their lives, Doe brings his life coaching expertise to leaders from every walk of life—from teachers and parents to presidents, political leaders, advocates for humanity, CEOs of multinational corporations, psychologists, peak performance athletes, and world-class entertainers. Since entering the life coaching industry more than 25 years ago, Doe has produced the number-one audio coaching system of all time. He is also an international author, award-winning speaker, chairman overseeing five private companies, and vice chairman of two companies. Doe has been honored by Accenture as one of the “Top 50 Business Intellectuals in the World,” by American Express as one of the top six business leaders in the world to coach their entrepreneurial clients, by Justice Byron White as one of the world’s “Outstanding Humanitarians,” and by the International Chamber of Commerce as one of the top ten “Outstanding People of the World.”</p> <p>Doe has worked with political and business leaders in diverse world communities such as South Africa, England, Cuba, Panama, Venezuela, as well as the United States. Through his strategies for “Leadership in Times of Crisis” and his systems for “Indirect Negotiations,” Doe has participated in negotiations that have broken patterns and rhetoric of violence.</p> <p>Doe has addressed such distinguished audiences as the British Parliament, Yale Business School, the Gorbachev Foundation's Cold War Forum, the Presidents' Summit for America's Future, and the State of the World Forum. He is an internationally best-selling author with 5 books published in 14 languages. Highly respected as an authority on the psychology of peak performance and personal, professional, and organizational turnaround, Doe has advised and counseled Fortune 500 CEOs, world-renowned medical doctors, championship sports teams, elite athletes and coaches (including Andre Agassi and Greg Norman), and legends in entertainment (such as Quincy Jones and Anthony Hopkins).</p>
<b>BOARDS</b>	<ul style="list-style-type: none"><li>•Trustee of the Universities Research Association, Inc.</li><li>•Member of the Environmental, Health and Safety Committee of the Board of Holdings</li><li>•Director of Holdings, High Performance Materials</li><li>•Board of Directors of Jazz Up Your Life, Inc.</li><li>•Why Not You Foundation Trustee</li></ul>

<p><b>CLUBS AND ORGANIZATIONS</b></p>	<ul style="list-style-type: none"> <li>• Malibu Bicycle Club – member since 1995</li> <li>• Rotary Club of Malibu</li> <li>• National Speakers Association</li> </ul>
<p><b>GIVING HISTORY (NOT CLIENT RELATED)</b></p>	<p><u>Foundation Giving:</u>                  Disabled Veterans of America: \$250,000 (2008)                  Junior League: \$2,500                  Collegiate Golf Championship: \$50,000-\$100,000 founded by John Doe                  Pathways, Home Health and Hospice: \$25,000 (2009)                  Hope for Kids: \$15,000                  State Prison System of California: \$14,600 (2009)                  Malibu Public Library: \$10,000 (2007)                  Our Lady of Malibu Catholic Church: \$30,000 (2008) and \$30,000 (2009)                  Children Need Your Help: \$500,000 pledge (\$50,000 per year) (2010)</p> <p><u>Personal Giving:</u>                  North Hawaii Community Hospital, Kamuela, HI: \$5,000, payable over 1year                  Yale University (cumulative giving: \$8M)                  UCLA School of Dentistry \$25,000 (2009)</p> <p><u>Political Giving:</u>                  \$253,500K in Combined Political Giving (mostly Republican)</p>
<p><b>GIVING HISTORY TO CLIENT</b></p>	<p>Responded to direct mail campaign</p> <ul style="list-style-type: none"> <li>• \$500 in 2009</li> <li>• \$500 in 2010</li> </ul>
<p><b>1-2-1 GENERAL OBSERVATIONS</b></p>	<ul style="list-style-type: none"> <li>• John and Jane Doe are a very dynamic couple</li> <li>• Very high capacity to make a major gift –highest single contribution was \$250k</li> <li>• Has a family foundation with assets of over \$8M</li> <li>• Giving is largely with non-profit organizations/institutions where they are or have been very active</li> <li>• Loyal to their respective universities and their children’s schools</li> <li>• Are very interested in helping youth, homeless, prisoners, elderly and disabled</li> <li>• Also interested in Catholic causes</li> </ul>
<p><b>1-2-1 RECOMMENDATIONS</b></p>	<ul style="list-style-type: none"> <li>• This couple will require further cultivation. Find opportunities to invite one or both of them to get to know you better.</li> <li>• Consider one or both for a volunteer leadership (very high level) position as you get to know them.</li> <li>• They have signaled interest in you by responding with small gifts to your direct mail program. Build a relationship from this.</li> <li>• When planning an ask amount, consider a multi-year pledge for this couple.</li> <li>• This couple is approaching the age when they may be interested in an estate planning gift.</li> <li>• This cultivation will take time but has very high potential.</li> </ul>