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be reviewed, that assignments be adhered to, and that the institution develops a strong culture of fundraiser and volunteer prospect management

NOTE:

CALIFORNIA STATE UNIVERSITY MARITIME ACADEMY  
REQUEST FOR PROSPECT ASSIGNMENT AND OR PROJECT CLEARANCE

PURPOSE: Cultivation \_\_\_\_\_ Solicitation \_\_\_\_\_ Stewardship \_\_\_\_\_

Note: STRATEGY PLAN REQUIRED for all requests – complete page 2 of this form

Requested by: \_\_\_\_\_ Today's Date \_\_\_\_\_

School/Dept/Program \_\_\_\_\_

Are you requesting to be Primary Manager? \_\_\_\_\_ Yes \_\_\_\_\_ No.  
(Primary Manager applicable ONLY for prospects with multiple assignments.)

PROSPECT INFORMATION -Individual OR corporation/Foundation (select ONE per form)

INDIVIDUAL

Name \_\_\_\_\_ Spouse \_\_\_\_\_

ID# \_\_\_\_\_ ID# \_\_\_\_\_

Degree/School \_\_\_\_\_ Degree/School \_\_\_\_\_

Home Address \_\_\_\_\_

CORPORATION FOUNDATION

Corporation/Foundation Name \_\_\_\_\_ ID# \_\_\_\_\_

Address \_\_\_\_\_

OTHER GIFT OFFICERS ASSIGNED:

\_\_\_\_\_

\*\*\*\*TO BE COMPLETED BY ADVANCEMENT SERVICES\*\*\*\*

OTHER ASSIGNMENTS/PROJECTS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPROVAL: \_\_\_\_\_ Approved \_\_\_\_\_ Denied \_\_\_\_\_ Pending DATE: \_\_\_\_\_

E-MAIL SENT TO: \_\_\_\_\_

COMMENTS: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

Vice President for University Advancement

