



Family Giving Center Intake Form

OCF DAF?		If so: what type?	Related Assets:		
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> P <input type="checkbox"/> WE	Fund Name	Value	Type

Value of DAF? <input type="checkbox"/> < \$100K <input type="checkbox"/> \$100K - \$2M <input type="checkbox"/> > \$2M	Comments:	

Contact Name(s): _____ **Does this work directly benefit the donor/advisor?**
☐ No ☐ Yes How? _____

About this donor/advisor/fund/foundation:

What challenges or desires led to engaging the Family Giving Center? What is happening currently?

What is the family/foundation hoping to achieve with the Family Giving Center's assistance? What are the desired outcomes and/or deliverables?

Family Giving Center Intake Form (Cont'd)

What will the follow-up be? How will the outcomes / deliverables be leveraged?

Is there any special expertise required to accomplish the desired outcomes?

Is there any specific tools or technological needs required to accomplish the desired outcomes?

What is the desired timeline to accomplish the outcomes?

Prospect Assessment	Y	N	?	Comments
Does OCF have the necessary skills / knowledge to support the prospect?				
Can OCF accommodate the desired timeline?				
Is the prospect in the OCF Family?				
Does this project support multi-generational giving?				
Does this project support intentional giving practices?				
Does this project build a strategic relationship?				