

TIERING CRITERIA

INDIVIDUAL STATUS	SCORE
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VIP

- History of philanthropic giving
- Owner of major local business
- Retired from upper management of major business
- High profile civic and/or community leader
- Involved/retired leader from major local nonprofit
- High potential for, or made additional gifts to CICF
- Beneficiary of wealth transfer
- Has a private foundation
- Introduces/includes PA in discussions with CF
- Makes referrals to CF

FUND TIERING CRITERIA	SCORE
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1. Size of donor-advised fund

- Market value - \$XXX - \$XXXX
- Market value - \$XXXX - \$XXXXX
- Market value - \$XXXXX- \$.....

2. Gift frequency to CF

- Initial gift only
- Annual gift
- 2-3 gifts annually
- More than 3 gifts per year

3. Deferred gift to benefit fund and/or CF

Yes

4. Funds with CF

- More than one fund established
- Endowment
- Future Gift

5. Grantmaking in past 3 years

- Suggests grants at least every year
- Cumulative amount
 - \$XXXX - \$XXX
 - \$XXXX - \$XXXX
 - \$XXXX - \$XXXXX

6. Fund Advisor Engagement with CICF

- Attends at least one event every 1-3 years
- Participates in co-investment or proposal referrals
- Seeks assistance with grantmaking, strategic charitable planning and/or family philanthropy
- CF volunteer