

MAILED SURVEY



AN OSG COMPANY

SURVEY REPORTS



THE GEORGE WASHINGTON UNIVERSITY

In an effort to uncover planned giving leads, The George Washington University (GWU) has partnered with Gabriel Group since 2012. A Donor Insight Survey was developed and sent to a select audience of 14,000 donors identi fi ed by the university as likely planned giving prospects based on age, number of gift s and a variety of other criteria. Several key survey questi ons indicated respondents' knowledge of and interest in various estate planning vehicles, providing gift planners with a robust pipeline of qualified planned giving prospects.

The original survey generated a total of 1,842 responses (12.87%), identi fi ed 775 highly qualifi ed leads (5.41%) and uncovered 96 existing bequests and 300 responders with no heirs.

A digital survey was later deployed to 5,736 additi onal donors (approximately 500 sent per month) generati ng 1,292 responses (21.2%) and 731 highly qualified leads (12.7%).

The George Washington University Survey Listing - Planned Giving Prospects Sorted by # of Hits, Cumulative Giving and Last Name																		V	THE GEORG WASHINGTO UNIVERSIT					10		
City		Zip	Phone	Age Range*	Grad View (projected)	School Alterclation (projected)	Cum. Giving	# of Gifts	# of Hits		Pi WE Almanty - Ora	CQA Almosty - Dim	Trank Almanay - Dist	1 dia manana aria - Cali	Pathamant - COh	Consister Bequese - Office	Califican Property - Diffe	Consider Sincultion - Dillo	Drivelar (3)A - Diel	Onnuter CT - Dille	Contradier Intel on Real, Plans - Chilf	Davide Dvg - Dag	Consider Grants - Cen	Partnered - D12h	ABO-MARCIN	PQ Palaw Up - Bas v
Richmond	VA	23221		55-64	1984	CCAS	\$616,800	10	13	Y	Y	Y	Ν	Ν	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	_
Washington Raleigh	DC	20007	202-337-1597	65-69	1983	SEHD	\$176,616	29	11	Y	Y	Y	Y	Ν	Y	Y	Ν	Y	Y	Y	Y	Ν	Ν	Ν	Y	N
Columbus		27615	000 001 07 17	55-64	1971	CCAS	\$120,110	375	11	Y	Y	Ν	Ν	Ν	Ν	Y	Y	Y	Y	Y	Y	Y	Y	Ν	Y	N
Columbia	NJ	08022	609-324-9340	55-64	1982	MED	\$3,525	31	11	Y	Ν	Ν	Ν	Ν	Ν	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Ν
Columna	MD	21044		80-84	1972	CCAS	\$36,440	43	10	Y	Y	Y	Ν	Ν	Ν	Y	Y	Y	Y	Y	Ν	Ν	Ν	Ν	Y	Y
Fresno	CA	93711	559-261-1475	85+	1948	MED	\$22,700	32	10	Y	N	N	Ν	N	N	v	v	v	v	v						
Alexandria	VA	22312		55-64	1968	GWSB	\$18.615	21	10	v	ni V	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	N	N	
Kingsville	MD	21087	410-592-9889	45-54	1984	MED	\$2,715	16	10	Y	N	N	N	N	f N	r v	1 V	f	1 V	Y	N	N	N	N		N
Olympia	WA	98506	360-259-8718	55-64	1988	GWSB	\$560	12	10	Y	N	N	N	N	IN N	• v	T	T	Y	Y	Y	Y	Y	N	N	
Richmond	VA	23227	804-200-1399	75-79	1959	SEHD	\$343	15	10	Y	N	N	N	N	N	r V	Y N	Y	Y V	1 V	r v	Y	Y	N	Y	
Berkeley Springs	WV	25411		65-69	1996	GWSB	\$125	4	10	Ŷ	N	N	N	N	N	r V	IN V	T	T	T	T	Y	Y	N	Y	Y
Fort Washington	MD	20744	301-248-2807	75-79	1972	SEHD	\$1.341.625	59	9	Y	Y	N	N	V	N	r V	ı v	T V	T	T	Y	Y	Y	N	N	
Potomac	MD	20854		55-64			\$101,800	6	9	N	Y	N	N	N	N	Y	r V	r V	' V	N	Y V	N	N	N	Y	
Atlanta	GA	30327	404-257-1678	65-69	1973	MED	\$8,425	33	9	Y	N	N	N	N	N	v	r V	r V	r V	T	T	T	Y	N	N	
Boca Raton	FL	33431	561-417-0001	55-64	1989	GWSB	\$7,100	6	9	Ŷ	N	N	N	N	N	Y	v	v	v	Y	T V	Ý	T	N		N
Alexandria	VA	22304	703-751-1451	55-64	1987	MED	\$2,785	10	9	Ŷ	N	N	N	N	N	Y	v	v	T Y	r V	I V	r v	T	N	N	
Halethorpe	MD	21227		55-64	1982	ESIA	\$1,400	23	9	Y	N	N	N	N	N	v	v	N	r v	r V	T Y	Y N	Y Y	N		N
Redding	CA	96003		80-84	1974	GWSB	\$1,215	43	9	N	N	N	N	N	N	v	·	N Y	• v	T V	•	N	T	N	Y	
Rockville	MD	20853	301-929-1312	70-74	1971	SEAS	\$825	9	9	Y	N	N	N	N	N	r Y	v	r V	' v	T V	T	T V	T		N	
Washington	DC	20019		55-64			\$400	4	9	Y	N		N	N		r V	ı v	T Y	'	T	T	T	T			N
Ellicott City	MD	21043	410-465-4387	75-79	1975	GWSB	\$370	13	9	N	N		N	N		r Y	i v	Y Y	1	T	T	T	Y	N		N
Washington	DC	20003		55-64	1988	GWSB	\$355	5	9	Y			N				T Y	· .	Y Y	Y	Y Y	Y N	Y N	N N	N Y	Y