



The Prospect
Finder

PANNING FOR GOLD:
FIND HIGH NET-WORTH PROSPECTS NOW!™

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INTRODUCTION

Who is your ideal client? How do you find them? Whether you are new to the financial services field or you are a seasoned professional, the ability to find and retain ideal clients will have a lasting impact on your own financial success. For many financial advisors and planners, servicing the high net-worth (HNW) market is a lucrative choice. Sometimes, good referrals come your way. Otherwise, you need to identify and create situations that will enable you to gain exposure to the HNW market.

This *interactive prospecting tool* will help you understand the role of prospect research in identifying new client prospects AND how to research client referrals before calling upon them for an appointment. It is intended to help you understand what resources are available in your own communities to identify wealth and prospective wealth. Why prospective wealth? Who are the up-and-coming corporate executives in your community? Who are the successful business entrepreneurs? Who are the philanthropic individuals? How can you tap into them? Read on..... and you'll learn new methods for identifying these potential clients.

The websites embedded in this document will launch you directly to the resources used by professional prospect researchers nationwide. Prospect researchers working in the nonprofit field are constantly identifying HNW individuals who are capable of making major gift dollar investments in their organizations. You'll learn about these resources and how you can harness them in order to grow your own practice.

We have focused on providing many *FREE* resources which you will find essential in your prospect research efforts. The firm is also a huge proponent of public libraries and encourages you to locate the resources available to you and the format in which they can be found. For example, many electronic databases available in libraries are available from your office or home simply by using the bar code on your library card. We encourage you to find the nearest libraries, perhaps at the county level, and visit their websites for more information. To locate a library in your state or

local community, please visit <http://www.publiclibraries.com>. Here you will find a nationwide list, alphabetically by state.

If you live or work in New York, you can apply for a New York Public Library (NYPL) card. With a NYPL card you can gain access to over 600 online sources. Approximately 90 sources are available off-site (from your computer) while the majority of sources you must visit one of the library's branches to gain access. To see what online sources the NYPL offers visit the website <http://www.nypl.org> and click on "Find Books, DVDs and More" at the top of the homepage. Follow the search instructions from there. Non-residents and those not working in NY are no longer able to purchase a card.

New Jersey residents and anyone employed in New Jersey can apply for borrowing privileges, in person, at the New Jersey State Library located in Trenton, NJ. Non-residents may purchase a New Jersey State Library card for an annual fee of \$100. This too must be done in person. For additional information on the numerous databases available for search from the library and for details on how to obtain a card visit <http://www.njstatelib.org>.

Many states also provide you with the capability to connect with a Reference Librarian through online chat 24/7 with your questions. Check with your state for availability. In New Jersey, you can connect via <http://www.gandanj.org>.

We also understand that a little money, prudently spent, can produce huge dividends. Links to fee-based resources are also provided. The service-providers should be contacted directly for pricing information. Costs for these services are not listed as they can change annually. Fee-based resources are identified by this symbol **\$\$**.

And finally, a brief word about the medium for this manual. The choice for this electronic format is simple: It is environmentally conscious and you will also be able to launch directly to the websites used by professional researchers nationwide. As the

internet evolves, future editions of this manual will keep pace with the latest tools available to the nonprofit community.

Happy Prospecting!

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