

# Unmasking Prospects: Live Research Showdown with Generative A.I.

**Love It or Hate It!**

With  
Additional  
Resources!



# Today's Team



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# Reminders!

- Focus today is on the live research
- Chat each other up in the chat – sending summary
- Add to Q&A so we can answer at end
- All perspectives are welcome
- DonorAtlas is one year old – formative years!
- **Above all, be kind**

**Purpose:** Identify potential lead donors to support starting up an impact fund.

**Scenario:** The file consists of existing donors to the Nationwide Free Clinic and Cooperative, a 501(c)(3) headquartered in New York City that operates a cooperative to give independent free clinics around the country cooperative bargaining advantages when purchasing medical supplies and services for their clinics.

**File Notes:**

- Records of active Donors in past 2 years
- Donor Name and Address was only information provided
- Handicap: No spouse names included; no giving to the organization

Fundraising scenario is FICTITIONAL

Names of people are REAL



# The Task

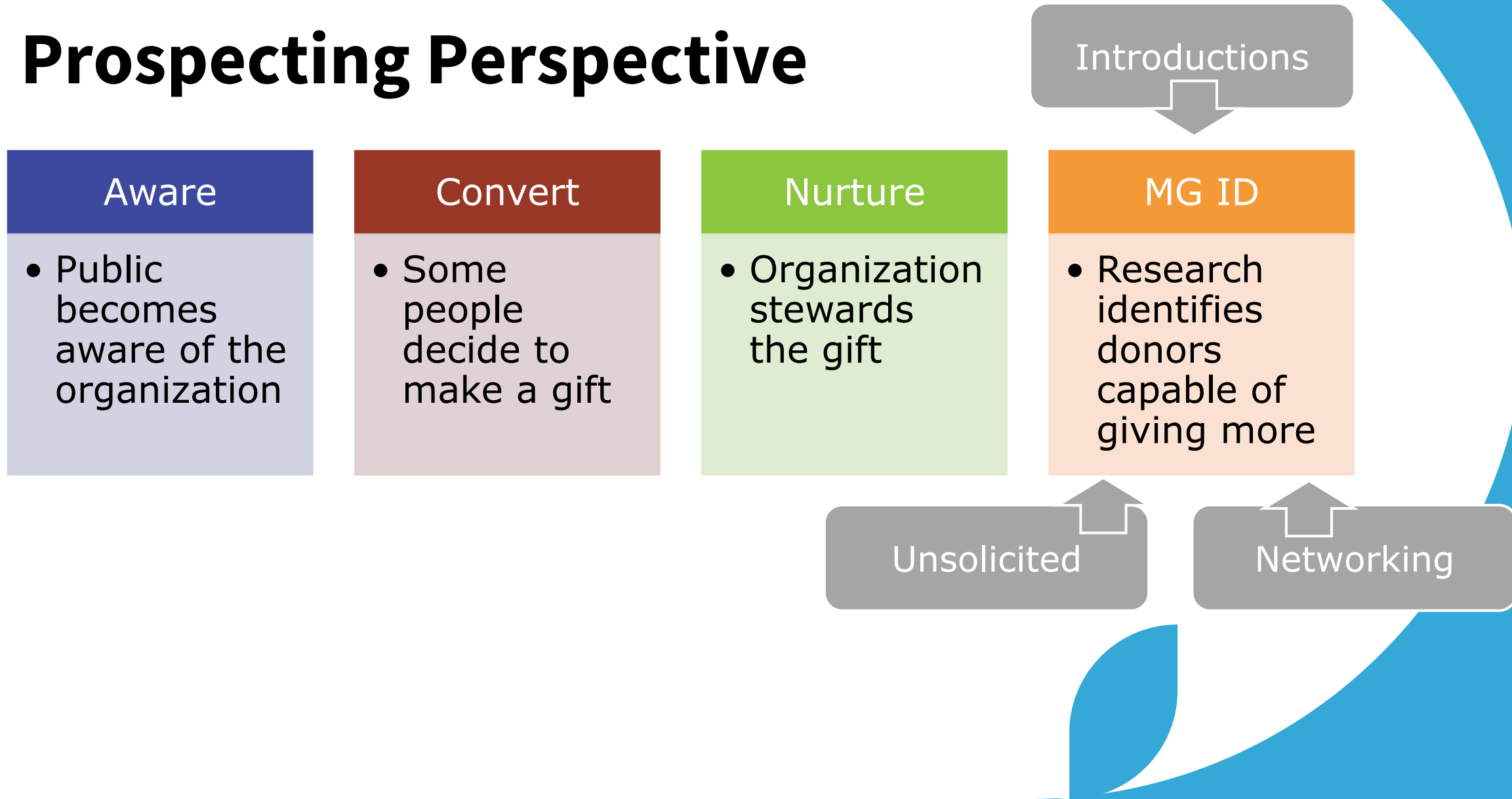
- Prioritize the list of donors for this project
- Perform very fast verification research (15 mins/name) focused on:
  - **Capacity:** Really want \$1M to jump start the funding, but \$500K okay.
  - **Interest:** Assessing if we have any sophisticated private investors in our donor base that care about health and human services.
  - **Philanthropy:** We want donors who are philanthropic and civic-minded.

# Will it be... Sterling, Rostov, or Rosenberg?

First	Last	City	State	Est. Net Worth Low	Est. Net Worth High	Healthcare Issues	Human Services Issue	Nonprofit Board Srvc	Nonprofit Largest Gift	Nonprofit Years Active
David	Sterling	Jericho	NY	\$15,000,000	\$25,000,000	yes	yes	yes	\$250,000-\$500,000	2004-Present
David	Rostov	Seattle	WA	\$10,000,000	\$20,000,000	yes	yes	yes		
Robert	Rosenberg	Edina	MN	\$2,000,000	\$6,000,000	yes		yes	\$2,500-\$1,000,000	1994-Present
Vince	Mauer	Cincinnati	OH	\$1,500,000	\$3,000,000	yes	yes		\$1,000-\$5,000	2000-Present
Mahlon	Marr	Peoria	AZ	\$350,000	\$800,000					
Tony	Tanke	Davis	CA	\$1,500,000	\$3,500,000			yes		
Wayne	Shepard	Stuart	FL	\$500,000	\$900,000				\$100,000-\$1,000,000	2000-Present
John	Merrill	Stanardsville	VA	\$1,000,000	\$3,000,000			yes	\$2,200,000	1980-Present
Edward	Boshell	Dallas	TX	\$5,000,000	\$35,000,000				\$10,000-\$25,000	2003-2023
Daniel	Hirt	Los Angeles	CA	\$2,000,000	\$5,000,000				\$150-\$250	2012-2014
Kendall	Killian	Fort Worth	TX	\$500,000	\$1,500,000				\$250-\$1000	2011-Present
Thomas & Nancy	Hallinan	Fairbanks	AK	\$200,000	\$800,000					

Next slide is voting! Grab your phone or ipad

# Prospecting Perspective



Share your top verification tips in the chat!

# Verification

- **Fast:** General rule is that only one-third will engage.
- **Disqualify First:** What knocks them out of the list? Find that first so you don't waste time.
- **Clear Criteria:** Define a few criteria that will qualify your prospects.
- **Limit your Research:** Know what your end-user wants and needs so you can qualify, find some additional key items, and then STOP researching.

>>Incoming poll >>>

# Variations Across Use Cases

## Use Cases

- Routine major gift pipeline ID
- Trip lists
- Special initiatives
- Campaigns
- Relationship mapping

## Deliverables

- List of names in a spreadsheet
- Names assigned to portfolio
- Research note in the CRM
- Word profiles merged from a spreadsheet
- Spreadsheet prepared for import to the CRM

The approach to prospecting might be the same, but each project is customized.



Anyone else struggle with contact info?

# Tactics

Any tips for fast, but good research?

- Start "inside the box"
- Confirm correct match – real estate gives us full name and sometimes spouse
- Sometimes I'll jump to internet for occupation or other identifiers
- And come back to tool for giving, foundation and board service
- Follow other clues or stop



**Aspire Links Directory – Free and Fee Sources**  
<http://www.aspireresearchgroup.com/research-links-directory>

# Results! Compare and Contrast

Seeking: Sophisticated investors/philanthropists, \$500K+ capacity, health and human services

Purpose	Likely to make a good prospect for the impact fund because he is associated with several New York organizations.
Gift Capacity	\$5M-\$9M Est. Net Worth <b>\$50M-\$90M</b>
Prospect	<b>David Sterling</b> Age: 69
Spouse	Mona Sterling  Mona is David's wife of 28 years. She is the founder of Golden Lioness Corp., a real estate firm headquartered in Brooklyn, and one of New York's few female developers. Together, they have five children and 11 grandchildren, with another grandchild on the way. Mona is involved actively in philanthropic and community organizations, including the Women's International Zionist Organization and the Hampton Synagogue where she serves on the board.
Address	100 WEST 80TH STREET - not confirmed 33 Windsor Dr, Jericho, NY 11753 (est. value: \$3,406,600)
Contact Info	Email: dsterling@sterlingrisk.com or dsterling@sterlingrisk.com Phone: +1 (516) 773-8618, (516) 487-0300
Giving to Others	Largest found: \$100K to Long Island Jewish Medical Center (2014) Recent/Relevant: \$2.5K - \$5K to American Friends of Beit Ruth in 2020
Foundation	Sterling family charitable foundation - not confirmed
Nonprofit Boards	International Society For Yad, Sterling Family Charitable Foundation, Chinese Theater Works Inc, American Friends Of The Rambam Medical Center, Nassau County Police Reserve Association Scholarship Fund Inc, Arlington Girls Softball Association, American Israel Public Affairs Committee, American Society For Yad Vashem Inc, United Jewish Appeal Federation Of Jewish Philanthropies of NY
Bio	David Sterling is the CEO and President of SterlingRisk Insurance, one of the largest privately owned insurance brokerages in the United States, which was founded by his grandfather in 1932. He joined the family business in 1978 after studying Risk Management and Insurance at the University of Wisconsin and earning a degree in Finance from Hofstra University. Under David's leadership since 1987, SterlingRisk has grown over 10 times in size, employing more than 250 professionals across eight regional offices from New York to Florida. The company offers business insurance, consulting, and personal insurance in diverse industries, and has pioneered innovative insurance solutions such as early online insurance policies.  David and his wife Mona are devoted to their family, community, and philanthropy, actively supporting numerous Jewish and humanitarian organizations including AIPAC, the American Friends of Rambam Hospital, Hampton Synagogue, WIZO, UJA Federation, and American Society for Yad Vashem. Together they have five children and 11 grandchildren, with another grandchild on the way.

**Wealth Context:** DonorAtlas presented his ownership role and family history of wealth. Traditional research found the occupation and more real estate, but not the wealth context.

**Community Involvement:** DonorAtlas provided more in-depth information, but traditional research confirmed a correctly named family foundation.

**Biographical Information:** DonorAtlas sourced more detailed family information, but traditional research did find the spouse.



**Overall:** Traditional approach still delivers on fast verification, but DonorAtlas offers the potential for many uses cases beyond verification.

Seeking: Sophisticated investors/philanthropists, \$500K+ capacity, health and human services

Purpose	Un/Likely to make a good prospect for the impact fund because...
Gift Capacity	\$1,000,000 - \$2,499,999 Est. Net Worth <b>\$30M - \$100M</b>
Prospect	<b>David Sterling</b> (DOB: 09/1956)
Spouse	Mona Gora Friedman (DOB: 08/1956)
Address	<ul style="list-style-type: none"> <li>33 Windsor Drive Jericho NY 11753</li> <li>10203 Collins Ave Unit 1701, Bal Harbour Florida 33154</li> <li>4 Coxs Curve Rd, Westhampton Beach, New York 11978-2711</li> </ul>
Contact Info	Email: dsterling@sterlingrisk.com Phone: 516-773-8600
Giving to Others	Largest found: \$499,999 Recent/Relevant: Cohen Children's Medical Center of New York - Northwell Health (2023) \$499,999
Foundation	Lavori Sterling Foundation Inc \$5.3M in assets
Nonprofit Boards	Mona: not found  David: American Friends of Rambam Medical Center, American Israel Public Affairs Committee, International Society for Yad Vashem Inc
Bio	David: Sterling Risk, CEO one of the largest national insurance brokers and a leading provider of risk management services and employee benefits. Revenue over \$90M based on comparable  Mona: runs Golden Lioness Corporation, a fully integrated property investment, management, and real estate development firm. SEC insider: No



FREE

# 1:1 Live Research Session!

## What's in your toolbox?

Thank you for attending the Unmasking Prospects November webinar with Aspire Research!

Our team is excited to offer (free!) 1:1 Live Research Sessions to attendees where we will:

- Do live research on any donor(s) of **your choosing**
- Walk you through how to do verified research on any donor in under **10 minutes**
- How we use AI **ethically** to save time, not to replace the human aspects of research & fundraising
- ... and go over anything YOU want to cover!

<https://www.donoratlas.com/aspire-webinar>