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| **Requested by:** **Date needed:** **Date of Request:** | **Purpose** (mailing, financial report etc.) |
| Do you need labels? |

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| **Criteria\*:** (Who/ What should be on the list/report? If you want a list of **gifts** & not donors, please specify below)**\*Ideas for Criteria:** Constituent codes , Zip Codes, Ratings, Target gift range, Giving history – appeals, new donors, top donors, gift amounts over a certain time period etc. (**Please be specific)**   |
| **Exclude: (Who should NOT be on the list/report?)*** Board members
* Friends
* Prior Mailing recipients. If checked, which mailings do you want to exclude?:
* Organizations
* Individuals
* **Other:**
* Do not solicit –*excluded by default for mailings*
* Deceased*- excluded by default for mailings*
* Bad address- *excluded by default for mailings*
* Inactive- *excluded by default for mailings*
* Ok to receive Newsletter- *excluded by default for mailings*
* Anonymous
 |
| **Output:** What information/fields should be on the list/report? I.e. primary address, Last names, Phone number, gift amounts etc. |
|  |
| **Sort by:** (Last name, Zip Code, gift amount, etc.?) |
| How do you want it be sent to you?* Print
* Email
* Save under:
 |

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_