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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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_