



VISIONARY
Philanthropic Consulting, LLC

Prospect Research: Finding the Highest-Value Prospects Already in your Database

March 26, 2026

Your Session Leader



Jason Blumenthal

Principal

From an early age, Jason Blumenthal developed a reputation as the go-to person for uncovering valuable insights and solving complex problems. Known for his ability to discern a client's true needs, Jason delivers solutions in a straightforward, actionable manner.

Jason launched his entrepreneurial journey in 1987 while still in high school, demonstrating a lifelong commitment to innovation and resourcefulness. In 2002, he founded Fulcrum Advisors, which has since evolved into a full-service research, development, and advisory firm specializing in non-profits, property development, and ultra-high-net-worth families.

Jason earned his degree in Economics and Theology from the University of St. Thomas. He resides in Minneapolis, Minnesota.

Why do prospect research

- Identify capacity & proclivity
- Identify connections
- Learn the language
 - Sports
 - Arts

Wealth Screening Software Is Powerful — But Imperfect

iwave®


DONORSEARCH

BLACKBAUD RESEARCHPOINT™

A Few Tricks

- Look for donors living in high-income areas
- Reconcile Giving vs Wealth Scores

Research Tools Everyone Can Use

- ✓ LinkedIn
- ✓ Google / Newspapers
- ✓ Facebook / Instagram / TicTok
- ✓ State business registries
- ✓ County property records
- ✓ Candid / Guidestar / ProPublica (990's)
- ✓ Open Secrets / OpenCorporates
- ✓ Business Journals
- ✓ Wealth X / FAA
- ✓ SEC-EDGAR / FEC

AI Reality Check

- AI is a research assistant... but a terrible fact-checker.
- Always verify with primary sources.

The Most Overlooked Research Tool

Asking the Donor

- Conversation often reveals more than database research.

Your Next Major Donor

- Your next major donor may already be:
 - A small annual giver
 - A volunteer
 - An event attendee

- They just haven't been identified yet.

VISIONARY

Questions & Answers



New Vision for a New Horizon

Visionary Methodology™

Reexamine

Assess your strategies & approaches

Dive deep to understand your donors' characteristics and key motivators.

Identify and leverage the most inspirational, effective, and relevant aspects of your mission and vision.

Reimagine

Innovate and find new ways to engage and inspire your donors

Discover the tipping points of service efficacy and satisfaction to maximize campaign potential.

Define your relevance to the philanthropic community and communicate it boldly.

Realign

Adjust your actions to stay in sync with your mission & goals

Deploy precious resources strategically and most efficiently to boost and amplify results.

Measure, monitor, and adjust as we collaborate with you to turn your vision into reality.

VISIONARY

Thank You!

For more information regarding prospect research:

Jason Blumenthal

jason@visionaryphilanthropy.com

