

Name: Michael Ried

Age: 34

Annual household income: \$200,000

Marital status: married

Children: 1 boy, 1.5 years old

Neighborhood: Uptown Waterloo

Education: Masters of Engineering from UW

Occupation: CEO of successful tech startup



Career path: Has been with this company for the past 4 years. Oversees a staff of 11 people. Reports to Investors and Board. Aim is to grow the business then sell it. His biggest concern is having the best talent on his team to take the business to the next level.

Interactions: Everything is online. He works constantly and has no time. Prefers emails and Slack to in-person meetings. Is very hard to meet in-person. The time he does spend is with his staff and his family. Work and building his business is his top priority.

Tech literacy: High. Everything is digitized and needs to be easy and concise for it to be accessible to him

Volunteer: is busy with kids' school and extra-circulars, and some additional volunteering (e.g. Food Bank). Will help when asked. Volunteers 5 - 7 hours a month

Charitable involvement: minimal. Philanthropic engagement is primarily social and tech-related (i.e. Plugin, Startups and Beer...)

What prompts their current charitable giving? It's known and comfortable and easy

Interest in SVP: Networking and to be/get known. He would be a money-only contributor, though come to one-off events where he could connect with other people and/or that didn't require a big commitment (All Partners Meetings, socials, Think Tankathon, Fast-Pitch), connecting with angel investors.

Hesitancy around SVP: Is the network/connections worth the cost? He's more interested in supporting start-ups than non-profits because he understands them better.

How would he learn more about SVP: Online research via website and social media, look for LinkedIn connections

Our interest in having him as a Partner: networking, money, skill-set

Name: Erin Stanbridge

Age: 47

Annual household income: \$350,000

Marital status: married

Children: 1 daughter (13 years), 1 son (10 years)

Neighborhood: Beechwood

Education: MBA (or equivalent job experience)

Occupation: Senior Vice-President in Insurance Firm

Career path: Recently started at this company, promotion from last role. Both Erin and her husband work in senior leadership positions and their careers are very important to them. Erin has aspirations beyond this position.

Interactions: Minimal and digital. Erin has an EA at work that manages her digital calendar. Family is just as important to Erin as her job, and she carves out time for her family.

Tech literacy: Very.

Volunteer: Primarily through work and work-sponsored initiatives. She is involved where her company has determined her to be involved. She does occasional one-off volunteer events at her children's school.

Charitable involvement: \$10,000 a year, mostly towards various events & causes (golf events, dinners, etc.). Erin is a breast cancer survivor and every year participates and fundraises for Run for the Cure.

What prompts their current charitable giving? Work connections and networking

Interest in SVP: Networking, highlighting her company's role in the community. She is short on time but is interested in the Think Tankathon and All Partners Meeting, some short-term consulting with Investees.

Hesitancy around SVP: Time

How would he learn more about SVP: Online research and would want to meet with Rose directly to discuss.

Our interest in having her as a Partner: profile, potential corporate sponsorship, network referrals, skill set



Name: Susan Deacon

Age: 47

Annual household income: \$225,000

Marital status: married

Children: 2 girls, aged 18 and 14

Neighborhood: West Galt

Education: Bachelors Degree

Occupation: stays-at home

Career path: Worked in banking after University. Has been stay-at-home for the past 14 years.

Interactions: does most of her daily transactions in person, prefers in-person meetings rather than emails.

Tech literacy: moderate. Uses email on a daily basis, has a smartphone which she uses for her calendar and a couple apps

Volunteer: is busy with kids' school and extra-circulars, and some additional volunteering (e.g. Food Bank). Will help when asked. Volunteers 5 - 7 hours a month

Charitable involvement: family gives approx. \$5000 a year, spread out over several organizations and causes (e.g. Food Bank, school, Cancer foundation, supporting friends and families in fundraising sports events)

What prompts their current charitable giving? They have been asked by friends and/or personal connection to cause

Interest in SVP: Wants to be a part of the community. Looking for more hands-on involvement, wants more self-purpose now that the kids are getting older and are more independent. Wants to learn about the community. SVP Teens for her kids.

Hesitancy around SVP: It seems Waterloo focused and she's in Cambridge and feels an allegiance to that community. It's a lot of money and might take away from other donations.

How would she learn more about SVP: She would probably hear about SVP through word-of-mouth then research it online via the website and Facebook

