Fictional sample. Every person, organization and source in this report is invented to show the format.

INTELLIGENCE REPORT

Fictional sample: Major Donor Dossier on Avery Q. Sampleton

Avery Q. Sampleton (fictional)

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MAJOR_DONOR_DOSSIER-2026-05-17

01 Executive Summary

Avery Q. Sampleton is a fictional philanthropist in the fictional State of Examplia whose disclosed giving over the last decade clusters around three pillars: cultural institutions in the Lanternport region, applied research at private universities, and policy groups focused on energy transition. Across the annual returns sampled, the Sampleton Family Foundation reported $42.6 million in grants made between fiscal year 2019 and fiscal year 2024, with the single largest disclosed gift being a $12.0 million commitment to the Tidewater Energy Initiative at Lanternport Polytechnic announced in March 2024 [E1][E2]. Examplia Board of Elections committee records list the subject as treasurer of the Lanternport Seawall Action Committee since 2021 [E3]. Land records in Harrowmere County and Quillford County identify two properties held in family LLCs with combined 2024 assessed values of $24.8 million [E4][E5]. Cadence of giving accelerated after a documented board transition at the family office in May 2023, when the founder stepped down as chair and the next generation assumed operational control [E6]. Coverage in the Examplia Giving Review during 2024 identified three new program areas of stated interest: climate adaptation in coastal towns, scholarships in public health, and contemporary craft acquisition for regional museums [E7][E8]. The dossier surfaces five public-record vectors a development officer can act on and isolates three areas where the record is thin.

02 Methodology

This is a fictional sample. The people, organizations, places, filings and publications in it are invented, and every source link points to a reserved .example address that does not exist. A live order cites the real public records it used, in the same structure. In the format shown, the profile aggregates foundation annual returns from the state charities bureau, political committee registration records (individual contributor records are not used), county land records, university news releases, and long-form profiles in the philanthropic and business press. Each datum is tagged with a source-strength score (primary filing, secondary press, tertiary blog) and a recency stamp. Quantitative aggregations are computed only across primary filings. Pattern observations are segregated into the analytical observations section and labeled as interpretations rather than facts.

03 Information Sources

- Sampleton Family Foundation annual returns, fiscal years 2019 through 2024 (fictional Examplia Charities Bureau)
- Annual returns for three operating nonprofits naming the subject as a director (fictional)
- Committee statement of organization (fictional Examplia Board of Elections)
- Harrowmere County and Quillford County land records (fictional)
- Lanternport Polytechnic news releases (fictional)

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- Profiles in the Examplia Giving Review and the Lanternport Ledger (fictional publications)
- Examplia Securities Office ownership disclosures (fictional)

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04 Findings

Philanthropic Footprint

The Sampleton Family Foundation reported $42.6 million in total grants paid between fiscal year 2019 and fiscal year 2024 across the six annual returns sampled [E1]. The 2024 return identifies 38 distinct grantee organizations, with the three largest grants being $12.0 million to the Tidewater Energy Initiative at Lanternport Polytechnic, $4.5 million to the Lanternport Museum of Glass and Craft, and $2.8 million to the Harrowmere Open Land Trust [E1][E2][E13]. The foundation lists Avery Q. Sampleton as president and Rowan Sampleton as treasurer on the 2024 return [E1]. Across the six-year window, education grants represented 48 percent of dollars deployed, arts and culture 27 percent, environment 19 percent, and other categories 6 percent [E1]. [1][2][13]

Political Committee Roles

The Examplia Board of Elections statement of organization for the Lanternport Seawall Action Committee, amended in March 2021, names Avery Q. Sampleton as treasurer [E3]. The committee is registered with a stated focus on coastal infrastructure policy [E3]. [3]

Family Office Real Estate

Harrowmere County land records identify a primary residence on Beacon Example Road in Lanternport held by Sampleton Harbor Holdings LLC since June 2011 with a 2024 assessed value of $18.4 million [E4]. Quillford County records identify a city apartment held by a related entity, SHH Quillford Holdings LLC, acquired in November 2017, with a 2024 assessed value of $6.4 million [E5]. An Examplia Securities Office disclosure dated February 2024 names Sampleton Harbor Holdings LLC as owner of 5.2 percent of a listed environmental services company [E9]. [4][5][9]

Governance Transitions

The May 2023 board transition at the family office was documented in an Examplia Giving Review profile published June 12, 2023, in which Avery Q. Sampleton described a generational handoff to her daughter Rowan as operating principal [E6]. The 2024 annual return reflects the change in officer roster, with Rowan Sampleton newly listed as treasurer [E1]. A Lanternport Ledger profile dated September 2024 reported three new stated program areas: climate adaptation in coastal towns, scholarships in public health, and contemporary craft acquisition for regional museums [E7][E8]. [1][6][7][8]

Public Board Service

Annual returns for three fictional operating nonprofits list Avery Q. Sampleton as a board member during fiscal year 2024: the Lanternport Lighthouse Heritage Trust, the Harrowmere Wetlands Guild, and the Examplia Council for Story and Song [E10][E11][E12]. Combined board tenure across the three organizations totals 17 years based on the officer schedules of those returns [E10][E11][E12]. [10][11][12]

05 Analytical Observations

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ANALYTICAL OBSERVATION

Capital Velocity

Analytical observation: the cadence of disclosed grant-making has accelerated since the May 2023 governance transition, with fiscal year 2024 disbursements running at roughly 1.7 times the trailing three-year average. This pattern appears consistent with family offices that shift from preservation to deployment in the first 18 months after a principal transition. The interpretation is probabilistic and the underlying causes are not disclosed in the cited filings. The hypothesis would be falsified if fiscal year 2025 grant flow reverts to the pre-2023 trend line.

ANALYTICAL OBSERVATION

Thematic Drift

Analytical observation: program-area composition has tilted toward applied energy policy and climate adaptation, and away from pure-science endowment giving. The 2024 grant roster suggests a deliberate thesis change rather than noise, given the consistency across the three most recent fiscal years and the explicit language in the September 2024 profile. The read is sensitive to one or two large outlier gifts in any given year and should not be over-fit.

ANALYTICAL OBSERVATION

Coalition Posture

Analytical observation: the treasurer role on a committee focused on coastal infrastructure appears consistent with the climate adaptation interest stated in the September 2024 profile. A committee role on its own may indicate either issue commitment or a relationship obligation, and the record does not distinguish between the two. A development officer should not infer political identity from a committee role.

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06 Confidence Indicators

Philanthropic Footprint	HIGH	Six consecutive annual returns are primary documents, cross-referenced with named-gift releases from two recipient institutions. Dollar aggregates and category shares are computed directly from the grant schedules.
Political Committee Roles	MEDIUM	The statement of organization is a primary filing that names its officers directly, but it is a single document. It is a committee record, not contributor information.
Family Office Real Estate	HIGH	Land records and an ownership disclosure are primary documents. The LLC chain to the named subject was traced through filed deeds.
Governance Transitions	MEDIUM	The board transition is corroborated by a named press profile and the updated officer roster. The new program areas come from a single interview and have not yet shown up as grants paid.
Public Board Service	HIGH	Three primary returns independently list the subject on the officer schedule. Tenure is reconstructed from prior-year schedules.
Capital Velocity	MEDIUM	Acceleration is observed in the filings, but the causal link to the governance transition is an inference. A multi-year pledge schedule is not excluded by the record.
Thematic Drift	LOW	The pattern rests on three fiscal years, which is not enough to separate a thesis change from the timing of a few large gifts.
Coalition Posture	MEDIUM	The committee role is a hard data point, but the issue-versus-relationship read is qualitative and rests on one press profile.

07 Strategic Implications

For a development team seeking an introductory meeting, three options surface from the record. The first is to lead with applied energy programming, where the subject has the most recent and largest concentration of disclosed capital. The second is to anchor on the September 2024 stated interest in coastal climate adaptation, where interest is articulated but no large gifts are yet booked. The third is to engage on public health scholarships, the smallest of

the new program areas and possibly the easiest to enter at a modest naming threshold. A separate option is to route the introduction through one of the subject's long-tenure board contexts. None of these vectors is a recommendation. The window of receptivity may compress once existing multi-year pledges are fully booked, and the next-generation principal has been in role for under 24 months, so a meeting with her directly would carry higher information value than one routed through legacy program officers.

08 Limitations

Findings rely on public records and press and do not reflect private giving, anonymous gifts, donor-advised fund activity, or commitments below disclosure thresholds. Annual returns lag decision-making by six to 18 months. Real estate outside the two named counties was not scanned. Business interests held outside the named family office LLCs are not visible. The relative authority of the two principals on any given grant is not observable. Individual political contributions are not profiled. Pattern interpretations in the analytical observations section are probabilistic and informational only.

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09 Informational Disclaimer

This report is provided solely for informational, research, and educational purposes.

DFX Intelligence does not make factual assertions beyond the cited source material and does not guarantee the completeness, accuracy, or future validity of any information contained herein.

Any observations, scores, categorizations, or strategic implications represent analytical interpretations generated from public information and automated synthesis systems and should not be relied upon as legal, financial, investment, political, campaign, compliance, or professional advice.

Users are responsible for independently verifying all material information before making decisions.

Donor analysis is generated from publicly available campaign finance, nonprofit, and related datasets. DFX Intelligence does not guarantee donor intent, political alignment, contribution likelihood, or fundraising outcomes.

Evidence Appendix

Citations referenced inline as [n] resolve to the entries below. Each entry includes a source URL, the time the source was fetched if available, and the excerpt used in synthesis.

[1] **Fictional source: Sampleton Family Foundation annual return (FY2024)**

https://charities.examplia.example/returns/sampleton-family-foundation/2024

Fetched 2026-05-12

Total grants paid: $9,820,000. Grant schedule lists 38 grantee organizations including a $12,000,000 multi-year pledge to the Tidewater Energy Initiative.

[2] **Fictional source: Lanternport Polytechnic launches Tidewater Energy Initiative**

https://news.lanternportpoly.example/2024/03/tidewater-energy-initiative

Fetched 2026-05-12

Lanternport Polytechnic announced the Tidewater Energy Initiative, anchored by a $12 million commitment from the Sampleton Family Foundation.

[3] **Fictional source: Examplia Board of Elections, Lanternport Seawall Action Committee**

https://elections.examplia.example/committees/lanternport-seawall-action

Fetched 2026-05-12

Statement of organization, amended March 2021. Treasurer: Avery Q. Sampleton.

[4] **Fictional source: Harrowmere County deed instrument 2011-06-022417**

https://deeds.harrowmere.example/instrument/2011-06-022417

Fetched 2026-05-12

Deed conveying 215 Beacon Example Road, Lanternport to Sampleton Harbor Holdings LLC, dated June 14, 2011. 2024 assessed value: $18,400,000.

[5] **Fictional source: Quillford County apartment transfer (2017-11)**

https://land.quillford.example/document/2017-11-apartment-transfer

Fetched 2026-05-12

Apartment interest transferred to SHH Quillford Holdings LLC in November 2017. 2024 assessed value: $6,400,000.

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[6] **Fictional source: Examplia Giving Review, a next-generation handoff at Sampleton**

https://givingreview.example/2023/06/sampleton-next-generation

Fetched 2026-05-12

In a June 2023 profile, founder Avery Q. Sampleton described stepping down as chair and elevating her daughter Rowan to operational lead.

[7] **Fictional source: Lanternport Ledger, program pivot at Sampleton**

https://ledger.lanternport.example/2024/09/sampleton-program-pivot

Fetched 2026-05-12

In a September 2024 interview, the foundation outlined three new priorities: coastal climate adaptation, public health scholarships, and contemporary craft acquisition.

[8] **Fictional source: Examplia Giving Review, Sampleton 2024 strategy update**

https://givingreview.example/2024/sampleton-strategy-update

Fetched 2026-05-12

The foundation formalized three new program areas as part of a 2024 strategy refresh under the next-generation operating principal.

[9] **Fictional source: Examplia Securities Office ownership disclosure**

https://securities.examplia.example/ownership/sampleton-harbor-holdings-2024

Fetched 2026-05-12

Disclosure dated February 14, 2024 reports Sampleton Harbor Holdings LLC as owner of 5.2 percent of a listed environmental services company.

[10] **Fictional source: Lanternport Lighthouse Heritage Trust annual return (FY2024)**

https://charities.examplia.example/returns/lanternport-lighthouse-heritage-trust/2024

Fetched 2026-05-12

Officer schedule lists Avery Q. Sampleton as a board member, with tenure beginning in 2017.

[11] **Fictional source: Harrowmere Wetlands Guild annual return (FY2024)**

https://charities.examplia.example/returns/harrowmere-wetlands-guild/2024

Fetched 2026-05-12

Officer schedule lists Avery Q. Sampleton as a board member, with tenure beginning in 2014.

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[12] **Fictional source: Examplia Council for Story and Song annual return (FY2024)**

https://charities.examplia.example/returns/examplia-council-story-and-song/2024

Fetched 2026-05-12

Officer schedule lists Avery Q. Sampleton as a board member, with tenure beginning in 2012.

[13] **Fictional source: Lanternport Museum of Glass and Craft, $4.5M craft acquisition gift**

https://museum.lanternportglass.example/news/2024/sampleton-craft-gift

Fetched 2026-05-12

The museum announced a $4.5 million gift in October 2024 to anchor a new contemporary craft acquisition fund.

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