



Repeal

FORM PL-4: ANNUAL REPORT FOR CHARITABLE FUNDRAISING PLATFORMS OR PLATFORM CHARITIES FOR 20__

SUBMIT TO:
Registry of Charitable Trusts
at [\[web address\]](#)

WEBSITE ADDRESS:
oag.ca.gov/charities

California Government Code section 12599.9
California Code of Regulations, title 11, section 315

Failure to electronically file Form PL-4 by July 15 of each calendar year may result in assessment of late fees and automatic suspension of registration status (Gov. Code, § 12586.1, Cal. Code Regs., tit. 11, § 341)

PART G

(For Registry Use Only)

To Be Completed by Consulting Charitable Fundraising Platforms

Complete if registrant was a consulting charitable fundraising platform for any time during the prior calendar year (see answer to question 16 in Part A of Form PL-4). If registrant served as another type of charitable fundraising platform (e.g., peer-to-peer and/or marketing charitable fundraising platform), limit the information in Part G to activities in the capacity of a consulting charitable fundraising platform during the prior calendar year. See instructions in Form PL-4 with Part A.

Name and registration number of registrant: _____

1. When charitable organizations solicited or received donations through the registrant's charitable fundraising platform, were donations made directly to the charitable organization? If "No," identify in Attachment 1 who donations were made to, explain why donations were not made directly to charitable organizations, and describe what needed to happen in order for donations to be sent to charitable organizations.

Yes

No, and answer specified in Attachment 1

2. Was the good standing status of charitable organizations with the Internal Revenue Service (IRS) determined before charitable organizations could solicit through the registrant's charitable fundraising platform? If "No," explain why in Attachment 1.

Yes

No, and answer specified in Attachment 1

3. Was the good standing status of charitable organizations with the California Franchise Tax Board (FTB) determined before charitable organizations could solicit through the registrant's charitable fundraising platform? If "No," explain why in Attachment 1.

Yes

No, and answer specified in Attachment 1

4. Was the good standing status of charitable organizations with the Attorney General's Registry of Charitable Trusts determined before charitable organizations could solicit through the registrant's charitable fundraising platform? If "No," explain why in Attachment 1.

Yes

No, and answer specified in Attachment 1

5. Other than when a charitable organization was not in good standing with the IRS, FTB and the Attorney General's Registry of Charitable Trusts, were there any circumstances under which a charitable organization was deemed ineligible to be sent donations made by a donor for the charitable organization through the registrant's charitable fundraising platform? Examples of such circumstances may be reflected in policies established by the registrant, or in terms of use or other agreements between the registrant and charitable organizations or platform users. If yes, identify and explain all circumstances in Attachment 1.

Yes, and answer specified in Attachment 1

No



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9. Were any charitable organizations deemed ineligible to be sent donations made through the registrant's charitable fundraising platform, and the donations were not sent to alternate charitable organizations? If "Yes," explain why in Attachment 1.

- Yes, and answer specified in Attachment 1
 No

10. Were any charitable organizations deemed ineligible to be sent donations made through the registrant's charitable fundraising platform, and the donations were instead sent to alternate charitable organizations? If "Yes," complete and submit Attachment 9.

- Yes, and Attachment 9 is attached
 No

11. Provide the following for donations made through the registrant's charitable fundraising platform. Use data from Attachments 8 and 9 to provide information.

Total number of donations made by all donors	
Total \$ amount of donations from all donors	
Total \$ amount of fees deducted from all donations (say 0 if no fees deducted)	
Total \$ amount of digital payment processing fees deducted from all donations (say 0 if no digital payment processing fees deducted)	
Total \$ amount of fees added to all donations (include tips or other fees optionally added by donors, say 0 if no fees added)	
Total \$ amount of donations sent to all charitable organizations	
Total number of charitable organizations that were sent donations	
Total number of charitable organizations that were sent donations within 5 business days of donations being made	
Total number of charitable organizations that were deemed ineligible, and not sent donations (say 0 if no charitable organizations were deemed ineligible)	
Total number of donations that were not sent to charitable organizations because they were deemed ineligible (say 0 if no charitable organizations were deemed ineligible)	
Total \$ amount of donations that were not sent to charitable organizations because they were deemed ineligible (say 0 if no charitable organizations were deemed ineligible)	
Total number of alternate charitable organizations that were sent donations (say 0 if no donations sent to alternates)	
Total \$ amount of donations that were sent to all alternate charitable organizations (say 0 if no donations sent to alternates)	

12. When donations were sent to charitable organizations, was the information required by California Code of Regulations, title 11, section 321 and listed below provided to charitable organizations? Write "Yes" or "No."

Date each donation was made by the donor	
Date donations were sent to the recipient charitable organization	
Each donation amount before fees were imposed, the fees imposed and by whom, and each donation amount after fees were imposed	

13. Before donations were sent to charitable organizations, was there any theft, embezzlement, diversion, and/or other misuse of donations made through the registrant's charitable fundraising platform? If "Yes," explain the occurrence in Attachment 1 and summarize the steps taken to resolve the misuse.

- Yes, and answer specified in Attachment 1
 No