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

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

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

WEBSITE ADDRESS:
oag.ca.gov/charities

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 H

(For Registry Use Only)

To Be Completed by Partnering Platform Charities and Charitable Fundraising Platforms

Part H is required to be filed by all platform charities, and charitable fundraising platforms that partner with other charitable fundraising platform(s) to facilitate solicitations on the other platform(s) ("partnering platforms"). All questions are limited in time to the prior calendar year. See instructions in Form PL-4 with Part A.

Name and registration number of registrant: _____

1. Provide the following information for each partnering platform that the registrant facilitated solicitations on: the official name of each partnering platform, the registration number of each partnering platform, and the charitable fundraising platform type(s) of each partnering platform (i.e., commercial, peer-to-peer, marketing, and/or coventuring charitable fundraising platform).

2. For facilitating acts of solicitation on a partnering platform, which of the following acts was the registrant responsible for under any partnership? Check all that apply and provide the supplemental information when applicable.

- ☐ Obtain consent from recipient charitable organizations to be listed or referenced by name on the partnering platform for solicitation purposes
- ☐ Work with the partnering platform on the information provided to platform users about recipient charitable organizations
- ☐ Work with the partnering platform to facilitate removal requests from non-consenting recipient charitable organizations
- ☐ Work with the partnering platform on solicitation disclosures provided to platform users
- ☐ Determine whether recipient charitable organizations are eligible to be listed on the partnering platform for solicitation purposes
- ☐ Receive donations that are made to the platform charity, in lieu of donations being made to recipient charitable organizations listed or referenced by name on the partnering platform for solicitation purposes
- ☐ Provide tax-deductibility of donations made on the partnering platform
- ☐ Work with the partnering platform on the tax donation receipts sent to donors who made donations on the partnering platform
- ☐ Hold donations made on the partnering platform
- ☐ Determine whether recipient charitable organizations are eligible to be granted or sent donations
- ☐ Communicate with donors or platform users regarding alternate recipient charitable organizations, when originally selected recipient charitable organizations on the partnering platform are deemed ineligible to be sent donations
- ☐ Send donations to recipient charitable organizations that are made by donors using the partnering platform who recommended their donations be granted to their selected recipient charitable organizations
- ☐ Send donations to recipient charitable organizations that are selected by platform users, when donation amounts are based on platform users purchases or other activity
- ☐ Notify donors or platform users when donations are sent to their selected recipient charitable organizations
- ☐ Other (specify in Attachment 1)



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3. Specify whether the registrant obtained prior written consent to list or reference by name one or more recipient charitable organization for solicitation purposes on a partnering platform. Select all that apply.

- ☐ Registrant obtained prior written consent
- ☐ Registrant did not have prior written consent

4. Was the good standing status of recipient charitable organizations with the Internal Revenue Service (IRS) determined before listing or referencing their names on a partnering platform for solicitation purposes, and before sending donations to recipient charitable organizations? If "No," explain why in Attachment 1.

- ☐ Yes
- ☐ No, and answer specified in Attachment 1

5. Was the good standing status of recipient charitable organizations with the California Franchise Tax Board (FTB) determined before listing or referencing their names on a partnering platform for solicitation purposes, and before sending donations to recipient charitable organizations? If "No," explain why in Attachment 1.

- ☐ Yes
- ☐ No, and answer specified in Attachment 1

6. Was the good standing status of recipient charitable organizations with the Attorney General's Registry of Charitable Trusts determined before listing or referencing their names on a partnering platform for solicitation purposes, and before sending donations to recipient charitable organizations? If "No," explain why in Attachment 1.

- ☐ Yes
- ☐ No, and answer specified in Attachment 1

7. Other than when a recipient 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 recipient charitable organization was deemed ineligible to be sent a donation made by a donor based on the solicitations performed, permitted, or otherwise enabled on a partnering platform? If yes, identify and explain all circumstances in Attachment 1.

- ☐ Yes, and answer specified in Attachment 1
- ☐ No

8. Was any fee deducted from and/or added to donations made by donors, based on the solicitations performed, permitted, or otherwise enabled on a partnering platform? If "Yes," identify each partnering platform, each type of fee that was deducted or added, and explain its purpose and how it is calculated. Include digital payment processing fees, and fees optionally added by donors like a tip. Also, for each type of fee, identify the official name of the person or entity who charged the fee (e.g., registrant, partnering platform, or other vendor). Use Attachment 1 for information that is publicly available. Use Attachment 2, for information that registrant reasonably and in good faith deems is confidential or trade secret information.

- ☐ Yes
- ☐ No
- ☐ Check box if Attachment 1 is attached
- ☐ Check box if Attachment 2 is attached

9. For each recipient charitable organization sent donations made on partnering platforms that were commercial charitable fundraising platforms and peer-to-peer charitable fundraising platforms, complete Attachment 3 by providing the total number and amount of donations made, fee information, total amount of donations sent, and whether donations were sent within the required number of days under California Code Regulations, title 11, section 320. Also, specify in Attachment 3, whether recipient charitable organizations were ineligible to be sent donations, and if so, the total number and amount of donations not sent due to ineligibility. If no partnering platforms were commercial charitable fundraising platforms and peer-to-peer charitable fundraising platforms, do not submit Attachment 3.

- ☐ Check box if Attachment 3 is attached

10. For each recipient charitable organization sent donations based on purchases or other activity performed by platform users on or through partnering platforms that were marketing charitable fundraising platforms, complete Attachment 6 by providing the total number of platform users who caused donations to be made, total amount of donations made, fee information, and total amount of donations sent. If no partnering platforms were marketing charitable fundraising platforms, do not submit Attachment 6.

- ☐ Check box if Attachment 6 is attached



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11. For each recipient charitable organization sent donations based on purchases or other activity performed by platform users on or through partnering platforms that were coventuring charitable fundraising platforms, complete Attachment 7 by providing the total amount of donations made, fee information, and total amount of donations sent. If no partnering platforms were coventuring charitable fundraising platforms, do not submit Attachment 7.

☐ Check box if Attachment 7 is attached

12. Were any recipient charitable organizations deemed ineligible to be sent a donation made by a donor based on the solicitations performed, permitted, or otherwise enabled on a partnering platform, and the donations were not sent to alternate recipient charitable organizations? If "Yes," explain why in Attachment 1.

☐ Yes

☐ No

13. Were any recipient charitable organizations deemed ineligible to be sent a donation made by a donor based on the solicitations performed, permitted, or otherwise enabled on a partnering platform, and the donations were instead sent to alternate recipient charitable organizations? If "Yes," complete and submit Attachment 4 for all partnering platforms.

☐ Yes, and Attachment 4 is attached

☐ No

14. Provide the following for donations made on all partnering platforms that were commercial charitable fundraising platforms and peer-to-peer charitable fundraising platforms. Use data from Attachments 3 and 4 to provide information. Do not answer question if no partnering platforms were commercial charitable fundraising platforms and peer-to-peer charitable fundraising platforms

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 \$ amount of donations that were sent to all alternate recipient charitable organizations (say 0 if no donations sent to alternates)	

15. Provide the following for donations made involving all partnering platforms that were marketing charitable fundraising platforms. Use data from Attachments 4 and 6 to provide information. Do not answer question if no partnering platforms were marketing charitable fundraising platforms.

Total number of platform users who selected recipient charitable organizations, and whose purchases or other activity caused donations to be made	
Total \$ amount of donations made based on platform user purchases or other activity	
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 (say 0 if no fees added)	
Total \$ amount of donations sent to all recipient charitable organizations	
Total \$ amount of all donations that were sent to all alternate recipient charitable organizations (say 0 if no donations sent to alternates)	



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16. Provide the following for donations made involving all partnering platforms that were coventuring charitable fundraising platforms. Use data from Attachments 4 and 7 to provide information. Do not answer question if no partnering platforms were coventuring charitable fundraising platforms.

Total \$ amount of donations made based on platform user purchases or other activity	
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 (say 0 if no fees added)	
Total \$ amount of donations sent to all recipient charitable organizations	
Total \$ amount of all donations that were sent to all alternate recipient charitable organizations (say 0 if no donations sent to alternates)	

17. Before donations were sent to recipient charitable organizations, was there any theft, embezzlement, diversion, and/or other misuse of donations made, based on the solicitations performed, permitted, or otherwise enabled on any partnering platform? If "Yes," for each partnering platform, explain the occurrence in Attachment 1 and summarize the steps taken to resolve the misuse.

☐ Yes, and answer specified in Attachment 1

☐ No