STATE OF CALIFORNIA PL-4 (Orig. 01/2023)

> SUBMIT TO: Registry of Charitable Trusts at [web address]

WEBSITE ADDRESS: oag.ca.gov/charities

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

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)

DEPARTMENT OF JUSTICE PART G PAGE 1 of 3

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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Repeal

6. Was any fee deducted from and/or added to donations made by donors for charitable organizations through the registrant's



charitable fundraising platform? If "Yes," identify 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. Do not include fees charged by a charitable organization or the charitable organization's vendors. Also, for each type of fee, identify the official name of the person or entity who charged the fee (e.g., registrant or the registrant's vendor). Provide information below. Use Attachment 2, for information that registrant reasonably and in good faith deems is confidential or trade secret information. ΠoN Check box if Attachment 2 is attached 7. Beyond the fees specified in response to 6, were any other fees charged to donors or other persons using the registrant's charitable fundraising platform, or to charitable organizations that solicited through the platform? If "Yes," identify each type of fee, who paid the fee, and explain its purpose and how it is calculated. Also, for each type of fee, identify the official name of the person or entity who charged the fee (e.g., registrant or the registrant's vendor). For information that the registrant in good faith and reasonably deems is confidential or trade secret information, use Attachment 2. Yes No Check box if Attachment 2 is attached 8. For each charitable organization sent donations made by donors through the registrant's charitable fundraising platform, complete Attachment 8 by providing the total number and amount of donations made, fee information, total amount of donations sent, and whether donations were sent within 5 business days. Also, specify in Attachment 8, whether charitable organizations were ineligible to be sent donations, and if so, the total number and amount of donations not sent due to ineligibility. Check box if Attachment 8 is attached

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Repeal



platforn	e any charitable organizations deemed ineligible to be sent donations made through the registrant' n, and the donations were not sent to alternate charitable organizations? If "Yes," explain why in A		
Yes	, and answer specified in Attachment 1		
☐ No			
	re any charitable organizations deemed ineligible to be sent donations made through the registran n, and the donations were instead sent to alternate charitable organizations? If "Yes," complete an		
Yes	, and Attachment 9 is attached		
☐ No			
	vide the following for donations made through the registrant's charitable fundraising platform. Use to provide information.	data from /	Attachments
	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)		
	en donations were sent to charitable organizations, was the information required by California Coction 321 and listed below provided to charitable organizations? Write "Yes" or "No."	le of Regul	ations, title
	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 fees were imposed	nt after	
donatio	ore donations were sent to charitable organizations, was there any theft, embezzlement, diversion ns made through the registrant's charitable fundraising platform? If "Yes," explain the occurrence irize the steps taken to resolve the misuse.		
Yes	, and answer specified in Attachment 1		
 No			