



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

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

Failure to to 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)

COMPLETE FORM PL-4 AS A FILLABLE FORM VIA THE ONLINE FILING SERVICE AVAILABLE ON THE ATTORNEY GENERAL'S [CHARITABLE FUNDRAISING PLATFORMS WEB PAGE](#)

Do not submit Form PL-4 as a PDF file  
The online filing service will not prompt a question when not applicable for a registrant

(For Registry Use Only)

### Part A. Initial Information

Select the calendar year for which this form is being filed. This is the "reporting year" in subsequent questions.

If registrant is authorized to file another registrant's Form PL-4, is registrant filing this form for itself, or for another registrant as an authorized partner for that registrant? If filing for another registrant, specify the registrant.

- Registrant is filing for itself  
 Registrant is filing for another registrant (specify the registrant this form is being filed for)

If Form PL-4 has already been filed for the reporting year, does the registrant want to amend the prior filing?

- Yes  
 No

### Part B. Registrant Information

1. Was registrant a charitable fundraising platform or platform charity in the reporting year? (If registrant met the definition of both a charitable fundraising platform and platform charity, the registrant is a charitable fundraising platform.)

- Charitable fundraising platform  
 Platform charity

2. If registrant is a charitable fundraising platform, was the registrant a partner to other charitable fundraising platform(s) in the reporting year, because the registrant was retained by other charitable fundraising platform(s) to facilitate solicitations on their platforms pursuant to a contract?

- Yes  
 No  
 N/A because registrant is a platform charity

3. Official name of registrant

4. Doing business as name(s)

5. Official address (do not use P.O. Box)

6. Mailing address (if different from official address)

7. Website address

8. Email address

9. Telephone number

10. Registration number as a charitable fundraising platform (if any)

11. Registration number as a trustee (if any)

12. Federal employer identification number



- 13. Contact person name (does not have to be person who signs form)
- 14. Contact person email address
- 15. Contact person telephone number

**Part C. Questions for Charitable Fundraising Platforms.** Provide all information only for the reporting year.

1. Specify the solicitation type(s) performed, permitted, or enabled. Select all that apply.

- Solicitation type A
- Solicitation type B
- Solicitation type C
- Solicitation type D
- Solicitation type E
- Other solicitations that are not types A to E

2. What types of platforms were used to perform, permit, or enable solicitations? Select all that apply and provide the additional information specified in parenthesis.

- Website(s) (specify address of home or landing web page for each domain name)
- Mobile device application(s) (specify name(s) for each application)
- Computer software application(s) (specify name(s) for each application)
- Other (describe the platform(s) and how platform users accessed and used the platform)

3. When donations were made by platform user donors, who were donations made to? Select all that apply.

- Registrant, and not directly to charitable organization(s)
- Partner(s) of registrant, and not directly to charitable organization(s)
- Platform user(s) engaged in peer-to-peer charitable fundraising (because donated funds were sent to their financial accounts and not directly to charitable organizations)
- Directly to charitable organization(s)
- N/A because no platform users made donations

4. If in response to 3 "Platform user(s) engaged in peer-to-peer charitable fundraising" or "Directly to charitable organization(s)" is selected, did the registrant or another person or entity receive and hold the donations made by donors before donations were sent to platform users engaged in peer-to-peer charitable fundraising or directly to charitable organizations? Select all that apply and provide the additional information specified in parenthesis, if any.

- Registrant received and held donations
- Another person or entity received and held donations (specify the official name(s) of the person(s) who received and held the donations)
- No
- N/A

5. Was any fee deducted from donations made based on solicitations performed, permitted, or enabled by the registrant's charitable fundraising platform, regardless of whether the fee was deducted before or after donated funds were sent to charitable organizations?

- Yes
- No

If "Yes," identify each type of fee that was deducted, and explain its purpose and how it was calculated. Include digital payment processing fees deducted from donations. Also, for each type of fee, identify the official name of the person or entity who charged the fee (e.g., registrant, partner, vendor).

Use the first section for information that is publicly available. Use the second section for information, if any, that the registrant believes is confidential or trade secret information. If confidential or trade secret information is specified, also explain why the registrant believes the information is confidential or trade secret information. (See Cal. Code Regs., tit. 11, § 315, subd. (g)).



Publicly available answer

Confidential answer

6. Specify whether the good standing status of charitable organizations with the Internal Revenue Service (IRS) was determined for each of the following, when applicable. If “No,” explain why.

		Yes	No	N/A
a.	Before listing or referencing the names of recipient charitable organizations for solicitation purposes (N/A for registrants that only engaged in solicitation type E)			
b.	Before sending donated funds to charitable organizations (N/A for registrants that only engaged in solicitation type E)			
c.	For registrants that only engaged in solicitation type E, before charitable organizations could solicit through the charitable fundraising platform			
d.	For registrants that only engaged in solicitation type E, before sending donations on a monthly basis or more frequently to charitable organizations that solicited through the charitable fundraising platform			

7. Specify whether the good standing status of charitable organizations with the California Franchise Tax Board (FTB) was determined for each of the following, when applicable. If “No,” explain why.

		Yes	No	N/A
a.	Before listing or referencing the names of recipient charitable organizations for solicitation purposes (N/A for registrants that only engaged in solicitation type E)			
b.	Before sending donated funds to charitable organizations (N/A for registrants that only engaged in solicitation type E)			
c.	For registrants that only engaged in solicitation type E, before charitable organizations could solicit through the charitable fundraising platform			
d.	For registrants that only engaged in solicitation type E, before sending donations on a monthly basis or more frequently to charitable organizations that solicited through the charitable fundraising platform			

8. Specify whether the good standing status of charitable organizations with the Attorney General’s Registry of Charitable Trusts was determined for each of the following, when applicable. If “No,” explain why.

		Yes	No	N/A
a.	Before listing or referencing the names of recipient charitable organizations for solicitation purposes (N/A for registrants that only engaged in solicitation type E)			
b.	Before sending donated funds to charitable organizations (N/A for registrants that only engaged in solicitation type E)			
c.	For registrants that only engaged in solicitation type E before charitable organizations could solicit through the charitable fundraising platform			
d.	For registrants that only engaged in solicitation type E, before sending donations on a monthly basis or more frequently to charitable organizations that solicited through the charitable fundraising platform			

9. For registrants that engaged in solicitation types C or D, what activities did platform users perform that caused donated funds to be sent to recipient charitable organizations based on solicitations performed, permitted, or enabled? Select all that apply and provide the additional information specified in parenthesis, if any.

- Purchasing goods or services sold on the charitable fundraising platform
- Using service(s) offered by the charitable fundraising platform (identify and explain each service)
- Other activities (identify and explain all other activities, e.g., making social media posts about the charitable fundraising platform, performing exercises)
- N/A because registrant did not engage in solicitation types C or D



**10. For registrants that engaged in solicitation types C or D**, provide the following information. For this question, platform user means a person who makes purchases or performs other activity through use of a charitable fundraising platform that causes donated funds to be sent to a charitable organization, and quarterly basis means sending donating funds within 30 days after the end of a 90-day period.

	Yes	No	N/A
a. Was any minimum donation amount required to be met before sending donated funds to recipient charitable organizations? If "Yes," specify the minimum donation amount(s) and the timeframes when each minimum donation amount applied.			
b. If "Yes" in response to 10a, when platform users caused donated funds to be sent to recipient charitable organizations and the donation minimum amounts were met, were the donated funds sent on a quarterly basis, or more frequently?			
c. If "No" in response to 10a, when platform users caused donated funds to be sent to recipient charitable organizations, were the donated funds sent on a quarterly basis, or more frequently?			
d. Could platform users find out that the total amount of donated funds sent to a charitable organization included funds based on their purchases or other activity, no later than 15 business days after the donated funds were sent? If "No," explain why.			
e. If registrant engaged in solicitation type D, was there a written agreement between the registrant and each recipient charitable organization that permitted the registrant to use the recipient charitable organizations' names for solicitation purposes before the solicitations began on the registrant's platform? If "No," specify the name and federal employer identification number of each recipient charitable organization the registrant did not have a prior written agreement with, and explain why for each such recipient charitable organization.			

N/A because registrant did not engage in solicitation types C or D

**11. For registrants that engaged in solicitation type C**, did the registrant provide disclosures listed below in solicitations before platform users could select recipient charitable organizations? If "Yes," submit a PDF copy of the disclosure language as viewable by platform users for each platform, including disclosures made via hyperlink. If the disclosure language changed in the reporting year, provide all versions of the language and specify in the PDF the timeframes each version was used.

	Yes	No	N/A
a. When donations were made based on platform user purchases or other activity, a statement as to who donations were made to.			
b. If there were circumstances under which a recipient charitable organization may not be sent donated funds based on platform user purchases or other activity, a statement that a recipient charitable organization may not be sent the donated funds, and an explanation identifying the most pertinent reasons for these circumstances.			
c. The maximum length of time it takes to send donated funds based on platform user purchases or other activity, with an explanation as to the length of time.			
d. If fees or other amounts were deducted from or added to donations made based on platform user purchases or other activity (other than digital payment processing fees), a statement explaining the fees or other amounts deducted from or added to donations.			
e. If registrant did not obtain prior written consent to list or reference by name one or more recipient charitable organizations for solicitation purposes, a statement that non-consenting recipient charitable organizations did not provide consent or permission for the solicitation.			

N/A because registrant did not engage in solicitation type C



**12. For registrants that engaged in solicitation type D**, did the registrant provide disclosures listed below in its solicitations? If “Yes,” submit a PDF copy of the disclosure language as viewable by platform users for each platform, including disclosures made via hyperlink. If the disclosure language changed in the reporting year, provide all versions of the language and specify in the PDF the timeframes each version was used.

		Yes	No	N/A
a.	If there were circumstances under which a recipient charitable organization may not be sent donated funds based on platform user purchases or other activity, a statement that a recipient charitable organization may not be sent the donated funds, and an explanation identifying the most pertinent reasons for these circumstances.			
b.	The maximum length of time it takes to send donated funds based on platform user purchases or other activity, with an explanation as to the length of time.			

N/A because registrant did not engage in solicitation type D

**13. For registrants that engaged in solicitation types A or B**, did the registrant provide disclosures listed below in solicitations to donors before donations could be completed? If “Yes,” submit a PDF copy of the disclosure language as viewable by donors for each platform, including disclosures made via hyperlink. If the disclosure language changed in the reporting year, provide all versions of the language and specify in the PDF the timeframes each version was used.

		Yes	No	N/A
a.	When donors made donations, a statement as to who donations were made to.			
b.	If there were circumstances under which a recipient charitable organization may not be sent donated funds made by a donor, a statement that a recipient charitable organization may not be sent the donated funds, and an explanation identifying the most pertinent reasons for these circumstances.			
c.	If donated funds were not sent contemporaneously to recipient charitable organizations after donations were made, the maximum length of time it takes to send the donated funds, with an explanation as to the length of time.			
d.	The fees or other amounts, if any, deducted from or added to donations made by donors, other than digital payment processing fees.			
e.	A statement as to the tax deductibility of a donation.			
f.	If registrant did not obtain prior written consent to list or reference by name one or more recipient charitable organizations for solicitation purposes, a statement that non-consenting charitable organizations did not provide consent or permission for the solicitation, and did not review or approve the content generated by platform users engaged in peer-to-peer charitable fundraising, when applicable.			

N/A because registrant did not engage in solicitation types A or B

**14. For registrants that engaged in solicitation types A or B**, provide the following:

		Yes	No
a.	Was a tax donation receipt sent to donors in accordance with Business and Professions Code sections 17510.3, subdivision (a)(1) to (4), and 17510.4 no later than 5 business days after donations were made? If “No,” explain why.		
b.	Could donors find out whether their donations were sent to a charitable organization no later than 15 business days after the donated funds were sent? If “No,” explain why.		

N/A because registrant did not engage in solicitation types A or B



**15.** Provide the following information in Attachment 1 for donations made from donors directly to charitable organizations based on solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform. Only report on donations made in the reporting year, including donations made in the reporting year but sent in a later year.

The following are column headers in Attachment 1. Comply with the instructions specified in parenthesis. Provide the information for each charitable organization in a row in Attachment 1. Charitable organizations should only be listed once. After including the required information in Attachment 1, save it and submit it as a CSV file. Attachment 1 can only be submitted as a CSV file.

- A. Reporting year (numeric only; e.g., 2024)
- B. Official name of registrant charitable fundraising platform
- C. Registration number of registrant charitable fundraising platform
- D. Official name of charitable organization sent donated funds based on solicitations performed, permitted, or enabled
- E. Charitable organization’s city (do not use abbreviations)
- F. Charitable organization’s state (postal 2-digit abbreviation only; e.g., CA)
- G. Charitable organization’s federal employer identification number (numeric 9-digits only; e.g., 000999555)
- H. Total number of donations from platform user donors (numeric only, e.g., 9999; say 0 if no platform user donors made donations)
- I. Total \$ amount of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- J. Total number of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- K. Total \$ amount of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- L. Total \$ amount of fees deducted from donations (numeric only; e.g., 9999; say 0 if no fees deducted)
- M. Total \$ amount of donations minus fees (numeric only; e.g., 9999)
- N. Total \$ amount of donations sent to charitable organization (numeric only; e.g., 9999)
- O. Were all donations from platform user donors sent to charitable organization within the maximum number of days required (per Cal. Code Regs., tit. 11, § 320, subds. (a), (c), & (d))? (from the day donations were made; say YES or NO or leave blank if N/A)
- P. If charitable organization was deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320) and not sent 1 or more donations, then the total \$ amount of donations not sent to charitable organization (numeric only; e.g., 9999; leave blank if N/A)
- Q. If charitable organization was an alternate because another charitable organization was deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320), then the total \$ amount of donations sent to charitable organization as an alternate (numeric only; e.g., 9999; leave blank if N/A)

N/A because no donations were made directly from donors to charitable organizations based on solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform

**16.** Provide the following for donations made from donors directly to charitable organizations based on solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform. Use data submitted in response to 15 to provide information.

a.	Total number of donations from all platform user donors (say 0 if no platform user donors made donations)	
b.	Total \$ amount of donations from all platform user donors (say 0 if no platform user donors made donations)	
c.	Total number of donations based on platform user purchases or other activity (say 0 if there were no donations because registration did not engage in solicitation types C or D)	
d.	Total \$ amount of donations based on platform user purchases or other activity (say 0 if there were no donations because registration did not engage in solicitation types C or D)	
e.	Total \$ amount of fees deducted from all donations (say 0 if no fees deducted)	
f.	Total \$ amount of all donations minus fees	
g.	Total \$ amount of all donations sent to all charitable organizations	
h.	Total number of charitable organizations that were sent donations	



i.	Total number of charitable organizations that were sent donations from platform user donors within the maximum number of days required (per Cal. Code Regs., tit. 11, § 320, subds. (a), (c), & (d))	
j.	Total number of charitable organizations that were deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) and not sent donations (say 0 if no charitable organizations were deemed ineligible)	
k.	Total \$ amount of donations that were not sent to all charitable organizations because they were deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320; say 0 if no charitable organizations were deemed ineligible)	
l.	Total number of alternate charitable organizations that were sent donations because another charitable organization was deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320; say 0 if no donations sent to alternates)	
m.	Total \$ amount of donations sent to all alternate charitable organizations because another charitable organization was deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320; say 0 if no donations sent to alternates)	

N/A because no donations were made directly from donors to charitable organizations based on solicitations performed, permitted, or enabled by the registrant's charitable fundraising platform

**17.** Provide the following information in Attachment 2 for donations made to the registrant or its partner(s) concerning charitable organizations and solicitations performed, permitted, or enabled by the registrant's charitable fundraising platform. Only report on donations made in the reporting year, including donations made in the reporting year but sent in a later year.

The following are column headers in Attachment 2. Comply with the instructions specified in parenthesis. Provide the information for each charitable organization in a row in Attachment 2. Charitable organizations may be listed more than once depending on who donations were made to. After including the required information in Attachment 2, save it and submit it as a CSV file. Attachment 2 can only be submitted as a CSV file.

- A. Reporting year (numeric only; e.g., 2024)
- B. Official name of registrant charitable fundraising platform
- C. Registration number of registrant charitable fundraising platform
- D. Official name of entity donations were made to (registrant or a registrant's partner)
- E. Registration number of entity donations were made to (as a trustee or charitable fundraising platform; leave blank if not registered)
- F. Official name of charitable organization sent donated funds based on solicitations performed, permitted, or enabled
- G. Charitable organization's city (do not use abbreviations)
- H. Charitable organization's state (postal 2-digit abbreviation only; e.g., CA)
- I. Charitable organization's federal employer identification number (numeric 9-digits only; e.g., 000999555)
- J. Total number of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- K. Total \$ amount of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- L. Total number of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- M. Total \$ amount of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- N. Total \$ amount of fees deducted from donations (numeric only; e.g., 9999; say 0 if no fees deducted)
- O. Total \$ amount of donations minus fees (numeric only; e.g., 9999)
- P. Total \$ amount of donations sent to charitable organization (numeric only; e.g., 9999)
- Q. Were all donations from platform user donors sent to charitable organization within the maximum number of days required (per Cal. Code Regs., tit. 11, § 320, subds. (a), (c), & (d))? (from the day donations were made; say YES or NO or leave blank if N/A)
- R. If charitable organization was deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) and not sent 1 or more donations, then the total \$ amount of donations not sent to charitable organization (numeric only; e.g., 9999; leave blank if N/A)
- S. If charitable organization was an alternate because another charitable organization was deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320), then the total \$ amount of donations sent to charitable organization as an alternate (numeric only; e.g., 9999; leave blank if N/A)



N/A because no donations were made to the registrant or its partner(s) concerning charitable organizations and solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform

**18.** Provide the following for donations made to the registrant or its partner concerning charitable organizations and solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform. Use data submitted in response to 17 to provide information.

<b>a.</b>	Total number of donations from all platform user donors (say 0 if no platform user donors made donations)	
<b>b.</b>	Total \$ amount of donations from all platform user donors (say 0 if no platform user donors made donations)	
<b>c.</b>	Total number of donations based on platform user purchases or other activity (say 0 if there were no donations because registrant did not engage in solicitation types C or D)	
<b>d.</b>	Total \$ amount of donations based on platform user purchases or other activity (say 0 if there were no donations because registrant did not engage in solicitation types C or D)	
<b>e.</b>	Total \$ amount of fees deducted from all donations (say 0 if no fees deducted)	
<b>f.</b>	Total \$ amount of all donations minus fees	
<b>g.</b>	Total \$ amount of all donations funds sent to all charitable organizations	
<b>h.</b>	Total \$ amount of donated funds that were not sent to all charitable organizations because they were deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320; say 0 if no charitable organizations were deemed ineligible)	
<b>i.</b>	Total \$ amount of donated funds sent to all alternate charitable organizations because another charitable organization was deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320; say 0 if no donations sent to alternates)	

N/A because no donations were made to the registrant or its partner(s) concerning charitable organizations and solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform

**19.** Provide the following information in Attachment 3 for donations made to platform users engaged in peer-to-peer charitable fundraising. Only report on donations made in the reporting year, including donations made in the reporting year but sent in a later year.

The following are column headers in Attachment 3. Comply with the instructions specified in parenthesis. Provide the information for each charitable organization in a row in Attachment 3. Recipient charitable organizations should only be listed once. After including the required information in Attachment 3, save it and submit it as a CSV file. Attachment 3 can only be submitted as a CSV file.

- A.** Reporting year (numeric only; e.g., 2024)
- B.** Official name of registrant charitable fundraising platform
- C.** Registration number of registrant charitable fundraising platform
- D.** Official name of recipient charitable organization referenced in peer-to-peer charitable fundraising solicitation
- E.** Recipient charitable organization’s city (do not use abbreviations)
- F.** Recipient charitable organization’s state (postal 2-digit abbreviation only; e.g., CA)
- G.** Recipient charitable organization’s federal employer identification number (numeric 9-digits only; e.g., 000999555)
- H.** Total number of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- I.** Total \$ amount of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- J.** Total \$ amount of fees deducted from donations (numeric only; e.g., 9999; say 0 if no fees deducted)
- K.** Total \$ amount of donations minus fees (numeric only; e.g., 9999)
- L.** Total \$ amount of donations sent to platform users engaged in peer-to-peer charitable fundraising for recipient charitable organization (numeric only; e.g., 9999)

N/A because no donations were made to platform users engaged in peer-to-peer charitable fundraising





**20.** Provide the following for donations made to platform users engaged in peer-to-peer charitable fundraising. Use data submitted in response to 19 to provide information.

<b>a.</b>	Total number of donations from all platform user donors	
<b>b.</b>	Total \$ amount of donations from all platform user donors	
<b>c.</b>	Total \$ amount of fees deducted from all donations (say 0 if no fees deducted)	
<b>d.</b>	Total \$ amount of all donations minus fees	
<b>e.</b>	Total \$ amount of all donated funds sent to all platform users engaged in peer-to-peer charitable fundraising	
<b>f.</b>	Total number of recipient charitable organizations referenced in solicitations by platform users engaged in peer-to-peer charitable fundraising	

N/A because no donations were made to platform users engaged in peer-to-peer charitable fundraising

**21.** Were any charitable organizations deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) to be sent donations made based on solicitations performed, permitted, or enabled, and the donated funds were not sent to alternate charitable organizations? If “Yes,” specify the name and federal employer identification number of each charitable organization, and explain why for each charitable organization.

Yes

No

**22.** Before donated funds were sent to charitable organizations, was there any theft, embezzlement, diversion, and/or other misuse of donations made based on solicitations performed, permitted, or enabled by the registrant’s charitable fundraising platform? If “Yes,” explain the occurrence and summarize the steps taken to resolve the misuse.

Yes

No

**Part D. Questions for Platform Charities and Certain Charitable Fundraising Platforms.** To be completed by platform charities, or charitable fundraising platforms that answered “Yes” to Part B Question 2. Provide all information only for the reporting year.

**1.** Provide the total number of partnering platforms that the registrant facilitated solicitations for pursuant to a partnership. Also, for each partnering platform provide its official name, registration number (if registered), website address, and the date when the partnership began (even if it began in another year).

Total number of partnering platforms

**2.** Which of the following was the registrant's responsibility for each partnership with a partnering platform? Select all that apply.

- Determine whether recipient charitable organizations are eligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) to be listed or referenced by name on the partnering platform for solicitation purposes
- 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 to facilitate removal requests from non-consenting recipient charitable organizations
- Provide information about recipient charitable organizations reflected in solicitations on the partnering platform
- Work with the partnering platform on solicitation disclosures provided to platform users
- Receive donations made to the registrant, in lieu of donations being made to recipient charitable organizations listed or referenced by name on the partnering platform for solicitation purposes
- 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 charitable organizations are eligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) to be sent donated funds
- Communicate with donors regarding alternate charitable organizations, when originally selected recipient charitable organizations on the partnering platform are deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) to be sent donated funds
- Send donated funds to charitable organizations



- Provide information on donated funds sent to recipient charitable organizations (per Cal. Code Regs., tit. 11, § 321)
- Provide an ability for donors to find out whether their donations were sent to a charitable organization
- Provide an ability for platform users who make purchases or perform other activity that cause donated funds to be sent to a charitable organization to find out that the total amount sent included funds based on their purchases or other activity

**3. Was any fee deducted from donations made to the registrant, based on solicitations performed, permitted, or enabled by any partnering platform, regardless of whether the fee was deducted before or after donated funds were sent to charitable organizations?**

- Yes
- No

If “Yes,” identify each type of fee that was deducted for each partnering platform, and explain its purpose and how it was calculated. Include digital payment processing fees deducted from donations. Also, for each type of fee, identify the official name of the person or entity who charged the fee (e.g., partnering platform, vendor).

Use the first section for information that is publicly available. Use the second section for information, if any, that the registrant believes is confidential or trade secret information. If confidential or trade secret information is specified, also explain why the registrant believes the information is confidential or trade secret information. (See Cal. Code Regs., tit. 11, § 315, subd. (g)).

Publicly available answer

Confidential answer

**4. Provide the following concerning the registrant’s good standing status with the Internal Revenue Service (IRS), the California Franchise Tax Board (FTB), and the Attorney General.**

		Yes	No
a.	Was registrant’s tax-exempt status revoked by the IRS at any time in the prior calendar year?		
b.	Was registrant’s tax-exempt status revoked by the FTB at any time in the prior calendar year?		
c.	Was registrant prohibited from operating or soliciting in California by the Attorney General at any time in the prior calendar year (per Cal. Code Regs., tit. 11, § 312)?		

**5. Provide the following information in Attachment 4 for donations made to the registrant concerning charitable organizations and solicitations performed, permitted, or enabled by all partnering platforms. Only report on donations made in the reporting year, including donations made in the reporting year but sent in a later year.**

The following are column headers in Attachment 4. Comply with the instructions specified in parenthesis. Provide the information for each partnering platform and charitable organization in a row in Attachment 4. Charitable organizations may be listed more than once depending on the number partnering platforms. After including the required information in Attachment 4, save it and submit it as a CSV file. Attachment 4 can only be submitted as a CSV file.

- A.** Reporting year (numeric only; e.g., 2024)
- B.** Official name of registrant
- C.** Registration number of registrant (as a trustee)
- D.** Official name of partnering platform
- E.** Registration number of partnering platform (as a charitable fundraising platform; leave blank if not registered)
- F.** Official name of charitable organization sent donated funds based on solicitations performed, permitted, or enabled
- G.** Charitable organization’s city (do not use abbreviations)
- H.** Charitable organization’s state (postal 2-digit abbreviation only; e.g., CA)
- I.** Charitable organization’s federal employer identification number (numeric 9-digits only; e.g., 000999555)
- J.** Total number of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)
- K.** Total \$ amount of donations from platform user donors (numeric only; e.g., 9999; say 0 if no platform user donors made donations)



- L. Total number of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- M. Total \$ amount of donations based on platform user purchases or other activity (numeric only; e.g., 9999; say 0 if there were no donations because registrant did not engage in solicitation types C or D)
- N. Total \$ amount of fees deducted from donations (numeric only; e.g., 9999; say 0 if no fees deducted)
- O. Total \$ amount of donations minus fees (numeric only; e.g., 9999)
- P. Total \$ amount of donations sent to charitable organization (numeric only; e.g., 9999)
- Q. Were all donations from platform user donors sent to charitable organization within the maximum number of days required (per Cal. Code Regs., tit. 11, § 320, subs. (a), (c), (d))? (from the day donations were made; say YES or NO or leave blank if N/A)
- R. If charitable organization was deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320) and not sent 1 or more donations, then the total \$ amount of donations not sent to charitable organization (numeric only; e.g., 9999; leave blank if N/A)
- S. If charitable organization was an alternate because another charitable organization was deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320), then the total \$ amount of donations sent to charitable organization as an alternate (numeric only; e.g., 9999; leave blank if N/A)

6. Provide the following for donations made to the registrant concerning charitable organizations and solicitations performed, permitted, or enabled by all partnering platforms. Use data submitted in response to 5 to provide information.

a.	Total number of donations from all platform user donors for all partnering platforms (say 0 if no platform user donors made donations)	
b.	Total \$ amount of donations from all platform user donors for all partnering platforms (say 0 if no platform user donors made donations)	
c.	Total number of donations based on platform user purchases or other activity for all partnering platforms that engaged in solicitation types C or D (say 0 if there were no donations because no partnering platforms engaged in solicitation types C or D)	
d.	Total \$ amount of donations based on platform user purchases or other activity for all partnering platforms that engaged in solicitation types C or D (say 0 if there were no donations because no partnering platforms engaged in solicitation types C or D)	
e.	Total \$ amount of fees deducted from all donations for all partnering platforms (say 0 if no fees deducted)	
f.	Total \$ amount of all donations minus fees for all partnering platforms	
g.	Total \$ amount of donated funds sent to all charitable organizations for all partnering platforms	
h.	Total \$ amount of donated funds that were not sent to all charitable organization for all partnering platforms because they were deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320; say 0 if no charitable organizations were deemed ineligible)	
i.	Total \$ amount of donated funds sent to all alternate charitable organizations for all partnering platforms because another charitable organization was deemed ineligible (per Cal. Code Regs., tit.11, §§ 312, 316, 317, 320; say 0 if no donations sent to alternates)	

7. Were any charitable organizations deemed ineligible (per Cal. Code Regs., tit. 11, §§ 312, 316, 317, 320) to be sent donations made to the registrant based on solicitations performed, permitted, or enabled by any partnering platform, and the donated funds were not sent to alternate charitable organizations? If "Yes," specify the name of the applicable partnering platform, the name and federal employer identification number of each charitable organization, and explain why for each charitable organization.

- Yes
- No

8. Before donated funds were sent to charitable organizations, was there any theft, embezzlement, diversion, and/or other misuse of donations made to the registrant, based on solicitations performed, permitted, or enabled by any partnering platform? If "Yes," for each partnering platform, explain the occurrence and summarize the steps taken to resolve the misuse.

- Yes
- No



**Part E. Signature**

Having typed my name below and by submitting this form electronically, I certify under penalty of perjury to the following: I have examined this form, including accompanying information, and to the best of my knowledge and belief, the content thereof is true, correct, and complete; I understand an electronic signature has the same legal effect as a hand-written signature; and I am authorized to sign this form for the registrant.

\_\_\_\_\_  
Name and Signature of Registrant's Authorized Agent

\_\_\_\_\_  
Title of Agent

\_\_\_\_\_  
Date

Signature requested if partner is submitting form for another registrant: Having typed my name below and by submitting this form electronically, I certify under penalty of perjury to the following: I have examined this form, including accompanying information, and to the best of my knowledge and belief, the content thereof is true, correct, and complete; I understand an electronic signature has the same legal effect as a hand-written signature; and I am authorized to sign this form for the partner submitting this form on the registrant's behalf.

\_\_\_\_\_  
Name and Signature of Partner's Authorized Agent

\_\_\_\_\_  
Title of Agent

\_\_\_\_\_  
Name of Partner

\_\_\_\_\_  
Date



## DEFINITIONS FOR FORM PL-4

“**Charitable fundraising platform**” is defined in Government Code section 12599.9, subdivision (a)(1).

“**Digital payment processing fee**” is defined in California Code of Regulations, title 11, section 314, subdivision (b).

“**Donor**” means, for charitable fundraising platforms that engage in solicitation types A, B, or E, a platform user who makes a donation based on solicitations performed, permitted, or enabled by the charitable fundraising platform. For charitable fundraising platforms that engage in solicitation types C or D, “donor” means a person or entity who is not a platform user and makes a donation based on solicitations performed, permitted, or enabled by the charitable fundraising platform, and purchases made or other activity performed by platform users.

“**Donated funds**” is defined in California Code of Regulations, title 11, section 314, subdivision (c).

“**Donation**” means a donation or recommended donation made by a donor.

“**Fee**” is defined in California Code of Regulations, title 11, section 314, subdivision (d).

“**Good standing**” is defined in Government Code section 12599.9, subdivision (a)(3).

“**Misuse**” is defined in California Code of Regulations, title 11, section 314, subdivision (f).

“**Partner**” is defined in California Code of Regulations, title 11, section 314, subdivision (g).

“**Partnering platform**” is defined in California Code of Regulations, title 11, section 314, subdivision (h).

“**Partnership**” is defined in California Code of Regulations, title 11, section 314, subdivision (i).

“**Peer-to-peer charitable fundraising**” is defined in Government Code section 12599.9, subdivision (a)(1)(4).

“**Platform**” is defined in California Code of Regulations, title 11, section 314, subdivision (j).

“**Platform charity**” is defined in Government Code section 12599.9, subdivision (a)(5). A person or entity that meets the definition of both a platform charity and charitable fundraising platform is deemed a charitable fundraising platform. See Government Code section 12599.9, subdivision (b)(1).

“**Platform user**” is defined in California Code of Regulations, title 11, section 314, subdivision (k).

“**Recipient charitable organization**” is defined in Government Code section 12599.9, subdivision (a)(7).

“**Solicitation**” is defined in Government Code section 12581.2.

“**Solicitation type A**” is defined in California Code of Regulations, title 11, section 314, subdivision (m).

“**Solicitation type B**” is defined in California Code of Regulations, title 11, section 314, subdivision (n).

“**Solicitation type C**” is defined in California Code of Regulations, title 11, section 314, subdivision (o).

“**Solicitation type D**” is defined in California Code of Regulations, title 11, section 314, subdivision (p).

“**Solicitation type E**” is defined in California Code of Regulations, title 11, section 314, subdivision (q).



**Office of the Attorney General**  
**Registry of Charities and Fundraisers**  
**Privacy Notice**  
**As Required by Civil Code § 1798.17**

**Collection and Use of Personal Information.** The Attorney General's Registry of Charities and Fundraisers (Registry), a part of the Public Rights Division, collects the information requested on this form as authorized by the Supervision of Trustees and Fundraisers for Charitable Purposes Act (Gov. Code, § 12580 et seq.) and regulations adopted pursuant to the Act (Cal. Code Regs., tit. 11, § 300 et seq.). The Registry uses the information in the administration and enforcement of the Act, including to register, renew, or update your organization's registration or to prepare reports pursuant to the Act. The Attorney General may also use the information for additional purposes, including in support of investigations and law enforcement actions, providing public access to information as required by the Act (Gov. Code, §§ 12587, 12587.1, 12590), and making referrals to other law enforcement agencies. Any personal information collected by state agencies is subject to the limitations in the Information Practices Act and state policy. The Department of Justice's general privacy policy is available at [www.oag.ca.gov/privacy-policy](http://www.oag.ca.gov/privacy-policy).

**Providing Personal Information.** All the personal information requested in the form must be provided. An incomplete submission may result in the Registry not accepting the form, and cause your organization to be out of compliance with legal requirements to operate in California.

**Access to Your Information.** The completed form is a public filing that will be made available on the Attorney General's website at [www.oag.ca.gov/charities](http://www.oag.ca.gov/charities) pursuant to the public access requirements of the Act. You may review the records maintained by the Registry that contain your personal information, as permitted by the Information Practices Act. See below for contact information.

**Possible Disclosure of Personal Information.** In order to process the applicable registration, renewal, registration update, application, or report, we may need to share the information on this form with other government agencies. We may also share the information to further an investigation, including an investigation by other government or law enforcement agencies. In addition, the information is available and searchable on the Attorney General's website.

The information provided may also be disclosed in the following circumstances:

- With other persons or agencies where necessary to perform their legal duties, and their use of your information is compatible and complies with state law, such as for investigations or for licensing, certification, or regulatory purposes;
- To another government agency consistent with state or federal law.

**Contact Information.** For questions about this notice or access to your records, contact the Registrar of Charities and Fundraisers, 1300 I Street, Sacramento, CA 95814 at [rct@doj.ca.gov](mailto:rct@doj.ca.gov).