

## **Fundraising Compliance Representation Policy**

**Last Updated:** March 20, 2026

This Fundraising Compliance Representation Policy (“Policy”) governs the responsibilities of nonprofit organizations and fundraising participants using the The Giving Step platform.

The purpose of this Policy is to ensure that fundraising activities conducted through the Platform comply with applicable laws and regulations governing charitable solicitation.

### **1. Responsibility for Legal Compliance**

Organizations using the Platform represent and warrant that they are responsible for complying with all applicable laws governing charitable fundraising and solicitation.

This includes, where applicable, compliance with state charitable solicitation laws in jurisdictions such as:

- California Supervision of Trustees and Fundraisers for Charitable Purposes Act
- New York Executive Law Article 7-A
- Massachusetts Public Charities Law

Organizations must ensure they have obtained any required registrations or approvals prior to soliciting donations.

### **2. Accurate Organizational Information**

Organizations agree to provide accurate and current information regarding:

- Legal name of the organization
- Tax-exempt status where applicable
- Organizational leadership and contact information
- Charitable purpose and mission

Misrepresentation of organizational status or charitable purpose is strictly prohibited.

### **3. Proper Use of Funds**

Organizations represent that donations received through the Platform will be used in accordance with the charitable purpose described in fundraising materials.

Organizations may not use the Platform to:

- Mislead donors regarding the intended use of funds
- Divert donations for personal benefit
- Conduct fraudulent or deceptive fundraising activities

#### **4. Tax Deductibility Representations**

Organizations are solely responsible for ensuring that representations regarding tax deductibility are accurate.

Where applicable, donors should be informed that tax deductibility depends on the nonprofit's status under the Internal Revenue Code Section 501(c)(3).

The Platform does not provide tax advice and does not guarantee deductibility.

#### **5. Independent Relationship**

Organizations using the Platform are independent entities and are not agents, partners, or representatives of The Giving Step.

Use of the Platform does not constitute endorsement or certification of any organization by the Platform.

#### **6. Platform Rights**

The Giving Step reserves the right to:

- Request documentation verifying nonprofit status or compliance
- Suspend or remove fundraising campaigns that violate this Policy
- Restrict or terminate access to the Platform where misuse is identified

#### **7. Indemnification**

Organizations agree to indemnify and hold harmless The Giving Step, its officers, employees, and partners from any claims, liabilities, damages, or regulatory actions arising from:

- Noncompliance with fundraising laws
- Misrepresentation of organizational status
- Improper use of donated funds

#### **8. Reporting Concerns**

Concerns regarding fraudulent fundraising or misuse of funds may be reported to:  
[legal@thegivingstep.com](mailto:legal@thegivingstep.com)

#### **9. Policy Updates**

This Policy may be updated periodically. Continued use of the Platform following updates constitutes acceptance of the revised Policy.