

## Introducing "Give Lively"

In order to best steward the funds and time that GBZC receives from its members, the Finance Committee has decided to change from primarily inviting donations through checks or PayPal to using the platform "Give Lively."

### *Why?*

Under the old system, GBZC has been paying about 2% plus \$0.50 for every transaction PayPal processes, and more if you chose to charge your donation to a credit card. Paying by check or cash is also not costless: our dedicated volunteer treasurers have had to expend time and effort manually recording and depositing your donation. It's also been work to send out end-of-year receipts for tax purposes.

Give Lively is a payment platform designed for non-profit charitable organizations that offers opportunities to incur lower fees *and* which also automatically delivers tax receipts.

### *Instructions for Give Lively*

The first time you donate using Give Lively you will be presented, either directly or by clicking on "choose another payment method," options for donating via secure ACH bank transfer, credit card, and possibly (if your device is set up for this) a GPay or Apple Pay "digital wallet." *If* your payment is one-time, you will also be presented with a PayPal option.

- If you use "Donate via Bank Account" GBZC pays *less than 1%* in fees, with *no* set fee per transaction.
- If you use a credit card (or digital wallet that draws on a credit card), we are charged 2.2% plus \$.30.
- If you use your PayPal account (available only for one-time donations) we are charged 1.99% plus \$0.49.

Learn more at this [Give Lively page](#). **We especially encourage you to choose the bank method for monthly donations**, since the per-transaction fees for other methods really add up! You will also be asked if you wish to cover any fees, so that GBZC receives the full amount of your donation.

Concerned about sharing your bank or card information? To use Give Lively, GBZC set up an account with the payment processor [Stripe](#), which has very high [security](#) and [privacy](#) standards.)

Give Lively will send you a receipt for your tax-deductible donation via email. On the receipt, you will see an invitation to create a *personal* account with Give Lively. If you do this (**which we recommend**), you will be able to access your entire giving history (for example, at tax time!) in one place, as well as easily cancel or change the amount of any recurring donations. (If you

choose to *not* set up an account and you need your donation records, be sure to save the emailed receipts.)

### *Need to Cancel an Old Pledge?*

If you switch from a recurring monthly payment set up under the old PayPal system to something else, you will need to cancel the future transactions scheduled there. If you drew the payments from your personal PayPal account: (1) Log into your account, go to the list of Activities, and click on a recent payment to GBZC. (2) Then click on "Manage payment" and "Cancel." If you paid by credit card, you will need to email [treasurer@bostonzen.org](mailto:treasurer@bostonzen.org) and ask us to cancel the recurring charges for you.

### *Additional Notes*

- Our old PayPal-or-check method did not make it clear how much of the fee charged for sesshin is payment for lodging and meals (and therefore not tax deductible) and how much is a tax-deductible donation. Your Give Lively receipt will now specify this.
- While the absolutely lowest-fee way to give a *one-time* gift to GBZC is to skip our website pages and donate through [PayPal Giving Fund](#) (which charges *no* fees, and also automatically supplies you with a receipt), there is a catch! While funds flow through Give Lively to GBZC in 0 to 7 business days, it can take up to 45 days for a PayPal Giving Fund donation to reach us. For time-sensitive or monthly donations, Give Lively is best.
- If you strongly prefer to use PayPal Giving Fund (or any of the "other ways to give" listed on our [Donate](#) page), please also send a note stating what it's for (e.g., "membership dues" or "annual drive") to [treasurer@bostonzen.org](mailto:treasurer@bostonzen.org).
- GBZC will not send out end-of-year statements for Give Lively or PayPal Giving Fund donations, since receipts are generated automatically. This will save our volunteer treasurers time and grief!