

Financial Advisor Info Sheet

Partnering with the Anthony Spano Foundation

The Anthony Spano Foundation is a 100% volunteer-led 501(c)(3) nonprofit based in Youngstown, Ohio. We help financial advisors deliver meaningful charitable planning solutions to clients — through donor-advised funds, fiscal sponsorship, and planned giving with no minimums, no red tape, and no geographic restrictions.

EIN: 47-1355321 | 501(c)(3) Public Charity | Founded 2014 | 100% Volunteer-Led

DAF vs. Private Foundation — Quick Comparison

	Donor-Advised Fund (ASF)	Private Foundation
Setup Time	Days, not months	6–18 months
Startup Cost	No setup fees	\$10,000–\$50,000+
Cash Deduction Limit	Up to 60% of AGI	Up to 30% of AGI
Appreciated Assets	Up to 30% of AGI	Up to 20% of AGI
5-Year Carryforward	Yes	Yes
Annual Reporting	None required	IRS Form 990-PF
Excise Tax	None	1.39% on investment income
Minimum Asset Level	None	\$250,000+ recommended
Grant Recommendations	Donor recommends	Board decides

How We Work With Advisors

Step 1	Client identifies a charitable goal; legacy gift, asset donation, or ongoing giving
Step 2	Advisor contacts ASF to discuss the right vehicle; DAF, fiscal sponsorship, or planned gift
Step 3	ASF handles all legal, administrative, and compliance requirements
Step 4	Client receives tax acknowledgment; advisor retains AUM on contributed assets

Services Available to Your Clients

- Donor-Advised Funds — establish a named charitable fund in days
- Fiscal Sponsorship — support a community project without forming a nonprofit
- Planned Giving — bequests, IRA beneficiary designations, appreciated asset gifts
- Stock & Securities Donations — avoid capital gains, maximize deduction
- Real Estate & Complex Assets — accepted on a case-by-case basis
- Grants & Scholarships — fund holders can recommend grants to eligible organizations

Why Advisors Choose ASF

- No minimum fund size — accessible for clients at every wealth level
- No geographic restrictions — we serve clients and communities nationwide
- Fast setup — funds established in days, not months
- 100% volunteer-led — low overhead means more impact for your clients
- Personal service — you work directly with foundation leadership, not a call center

Anthony Spano Foundation

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