



# GREAT THINGS START AT St. Anne's

## HOW TO MAKE A GIFT OF STOCK

A gift of stock can change lives at St. Anne's! Making a gift of stock to St. Anne's is easy to do, and can provide significant tax advantages for many donors. In most cases, you will receive an income tax deduction based on the full market value of the stock on the day that St. Anne's receives it. In addition, you can avoid capital gains taxes that you would pay on the appreciated value of the stock if you were to sell it yourself and make a gift of the proceeds to St. Anne's. You should check with your tax advisor for specific information about tax benefits. St. Anne's Stock Policy, as approved by the Board of Directors, is to sell securities immediately upon receipt.

1 Please contact St. Anne's Development Office to notify the organization of your intent. The Development staff can provide you additional information and will work with the stock broker to ensure that the transaction will proceed in a timely fashion. Please contact Vanessa Botshekan for more information at [vbotshekan@stannes.org](mailto:vbotshekan@stannes.org) or (213) 381-2931, x248.

2 Provide a letter of instruction to your broker or mutual fund company indicating your intent to make a charitable gift to St. Anne's. Your broker or mutual fund company can provide you with specific requirements they may have (e.g., you may need to have your signature "guaranteed" or notarized; they may have a recommended way to deliver certificates if your stocks are held in "street name," etc.). Please note that gifts of mutual funds can take up to 7-10 business days to be transferred.

Your letter should include the following information:

- Account Name: **St. Anne's Maternity Home**
- Account No.: **#210-065520-182**
- Delivery Instructions via DTC: **Morgan Stanley Wealth Management, #0015**
- St. Anne's Tax I.D.: **95-1691306**

3 Provide a copy of the letter that you sent to your broker or mutual fund company to St. Anne's stock broker, Brent Eskoff of Morgan Stanley Wealth Management, at the contact information listed below. Providing this letter will allow your stock gift to be matched with your name which will, in turn, allow us to acknowledge your gift in a timely manner.

M. Brent Eskoff (assistant: Lisa DiMaggio), First Vice President / Financial Advisor  
Morgan Stanley Wealth Management  
24300 Town Center Drive, Ste 200 | Valencia, CA 91355  
Phone: 661-290-2023 | 800-669-2455 | Fax: 661-259-8557 | [Brent.Eskoff@morganstanley.com](mailto:Brent.Eskoff@morganstanley.com)  
California Insurance License #0A13996



Most donors find that making a direct transfer of stock through St. Anne's stock broker is the most convenient way to make a gift of this type. Occasionally, however, donors prefer to make a gift of stock in other ways. Please contact Vanessa Botshekan for more information at [vbotshekan@stannes.org](mailto:vbotshekan@stannes.org) or (213) 381-2931, x248 to make the arrangements that work best for you.



# ABOUT St. Anne's

## WHO WE ARE

Opened in 1908 as a safe refuge for unwed mothers, **St. Anne's has evolved** into one of the most highly regarded social-service agencies in the country. We offer residential care and transitional housing, family education and mental health services, early childhood education and workforce development. These **comprehensive services** nurture the safety, success and hope of parents and children, building strong families from the inside out. We aim to **break the cycle** of homelessness, poverty, abuse and neglect for Los Angeles families.

## WHO WE SERVE

Our programs provide our city's most vulnerable with the tools and assistance they need to improve the long-term safety and success of their children and families:

- **Infants and toddlers** thrive in our Early Learning Centers while their parents go to work and school.
- **Preschoolers** learn the ABCs and begin a love of learning.
- **Young mothers** living at St. Anne's break the cycles of their past, learn to parent and create safe homes for their young children.
- **Former foster youth** receive counseling, child care and career counseling so they can start to build meaningful careers and provide for their families.
- **Low-income parents** receive counseling and parenting classes through St. Anne's each year. They work with St. Anne's to build healthy families and prevent another generation of foster children.

## AT A GLANCE

OPERATING BUDGET : **\$23 MILLION**

NUMBER SERVED ANNUALLY: **1,661**

PRESIDENT & CEO: **Tony Walker**

STAFF: **300**

VOLUNTEERS: **275** in programs and fundraising

BOARD OF DIRECTORS: **30** members provide governance, strategic direction and oversight.


BOARD OF TRUSTEES: **25** members raise funds and awareness


Corporate oversight of the board: **Franciscan Sisters of the Sacred Heart**

**Six-acre main campus** in the Westlake neighborhood's Rampart community

New site **St. Anne's at Crenshaw District** will help families stay intact and thrive

Permanent supportive housing complex **Beverly Terrace** will open in 2017

 **Accredited** by the Council on Accreditation, signifying exemplary fiscal, operations and program management

 **11 consecutive years of four-star ratings** from Charity Navigator, indicating sound fiscal and management guidelines and practices

## RESULTS

KEY INDICATORS:

**53% of teenagers** under age 18 were discharged according to their permanency plan.

**80% of young women** ages 18 to 24 and their children obtained permanent housing at discharge.

**87% of young mothers** ages 18 to 24 had an increased income at discharge.

**59% of workforce development clients** (ages 18 to 24) were enrolled in a paid internship or employed.

**74% of children** in the Infant/Toddler program and **47% of children** in the Preschool program demonstrated **65% improvements** in reaching developmental milestones.

**84% of mental health clients** met at least one treatment goal.

**90%+ of families** remained intact while enrolled in St. Anne's programs.



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