

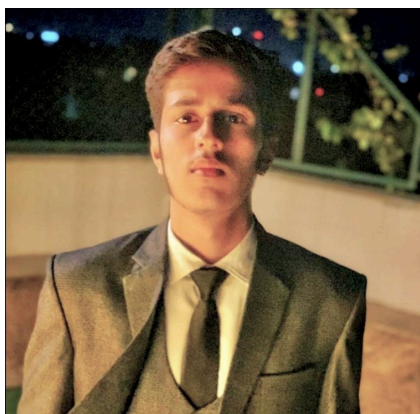
## AN EXCITING NEW YEAR BEGINS

### Online but still On-point

One of the things that has stood out to me this quarter is the powerful force that technology can be for good.

First, let me illustrate by a number: In the past 90 days Young Investors Society has had **110 new schools sign up**, reaching 620 schools in 40 US states and 16 countries around the world. That's a rate of adding more than one new school every day! And the majority of the new schools are coming organically from teachers or students searching online for investing resources and finding YIS. That's powerful growth driven by technology.

Second, I will illustrate by a story. **Siddhant M.** is a young



Pictured: Siddhant M.

man from Ahmedabad, India.

For more than a year, YIS has been actively looking for ways to grow in India, but with little success. Then came Siddhant, who was searching for investing resources online. He says:

*"Investing is something I have always been curious and passionate about. I could gain plenty of knowledge from online courses, **but no place existed where I could apply it.** To satisfy my curiosity, I was searching for clubs centered towards investing and found YIS. I started a YIS club in Ahmedabad, India to share the pursuit of knowledge that YIS brings and to provide concrete exposure to teenagers passionate about finance. Especially in India, **the education system does not consider financial literacy an important component**, and hence no organizations existed for this cause. **I wanted to do something which would make a difference, impact students**, and give me the honor to be the bridge between individuals and*

## ONGOING PROJECTS

### Dollar-a-Day Matches:

We sponsored 100 kids during the 2019-2020 school year, and target to sponsor 100 in 2020-2021, along with 12 "Start Investing Now" sponsorships.

### Program Development:

- Continuous refinements to the website and MyYIS portal.
- Creating ESG Module.
- Translating Lessons into Chinese and Spanish.
- Creating Advanced Courses.

### Virtual Gala:

TBD.

To be held in the Spring 2021.

*financial literacy. **After having the first YIS Club meeting, I am convinced that my goal of enhancing financial literacy and the passion for finance, will be fulfilled through YIS.***

Siddhant then not only started a YIS club at his school, Ahmedabad International School, but went on to spread the word to friends who started two other clubs in his city.

### Global Online Club

Coming out of our annual Board Onsite meeting in July was the idea to create a virtual Zoom club that would be open to all YIS students that were either 1) learning on their own, or 2) missed their club meeting that week. From this concept was born the Global Online Club. What we've seen is a great new avenue to increase engagement, remove barriers, and create a global community. Check out [Here](#) the recent Global Online Club taught by Siddhant who stepped up to be a guest instructor for the Zoom meeting in October, teaching the "7 Golden Rules of Investing" lesson as YIS kids throughout the world tuned in. The meeting closes out with two YIS students explaining how they

started their own hedge fund, Populous Management. Pretty incredible!

Starting in October, the Global Online Club will begin featuring guest teachers from the financial community and our Advisory Boards. Please sign up if you are interested; the kids are so looking forward to meeting many of you.

### Growing Partnerships

Another thing I am really excited about this quarter is to see our existing partnerships expand. Our partnership with the **CFA Institute** continues to strengthen. Young Investors Society was able to partner with the CFA Institute's Investment Foundations Program, an 80-hour course for people to learn about and qualify for a Certification in the Finance Industry.

**Richard McGillivray**, AsiaPac Director of Partnerships at the CFA Institute and I filmed a number of promo videos to advertise the program. You can watch them [Here](#). We've already

had 64 students sign up to take the course, which was a great initial response! In addition, YIS has partnered with CFA Canada and Junior Achievement, to sponsor JA kids to take the YIS courses, an exciting new avenue for growth.

In addition, we also expanded new partnerships this quarter with the incredible organizations of the **Carolina Youth Coalition**, and the **USL Black Players Alliance** to expand YIS for At-Risk students.

### Advisory Board Structure

Another takeaway from our Board Onsite was to add more structure and guidance to the Advisory Boards. This quarter we produced a **Handbook for Advisory Boards**. Currently we have 80 members of YIS Advisory Boards in 6 regions: West Coast, Mid-West, New York, Boston, Hong Kong and Southeast Asia. This quarter we added over a dozen incredible new advisory board members including successful portfolio manager **Laura Geritz**, and professional soccer players **Amobi** and **Brandon Miller**. As YIS continues to grow, and our volunteer base expands, I envision the Regional Advisory Boards being the backbone of our organization's structure. The goal will be that each region of YIS is self-sufficient and financed by their Regional



Brilliantmont YIS Club in Lausanne, Switzerland

Advisory Board's fundraising efforts. I'm so grateful for all of our amazing global volunteers.

## Fundraising

We're excited to have Jane Winslow and Steve Barrus heading up the Fundraising Committee this

"I WANTED TO DO SOMETHING THAT WOULD MAKE A DIFFERENCE AND IMPACT STUDENTS..."

(SIDDHANT M, AHMEDABAD)

that's all the more reason to continue to make our best effort to bring our program of financial skills to kids around the

year. They bring great ideas and leadership for the year to come. I truly believe we are reaching the scale and the impact to be eligible for large corporate donations, similar to Edmodo and CFA Institute's ongoing support.

This quarter we raised \$10,900, which included a \$5,000 grant from **AmeriHome Mortgage Company** for our At-Risk Initiative, which set a great pattern for how to apply and qualify for local grants that target specific schools. For the year, our goal is to raise at least \$250k which is essential to fund YIS programs and provide 100 kids with Dollar-a-Day matching sponsorships.

## Goals for the Year Ahead

These are undoubtedly

difficult and uncertain times with the global coronavirus pandemic continuing to put pressure on organizations and individuals. But

world. In fact, I believe the shift to digital and remote learning is actually a huge opportunity for YIS to expand our reach.

This year our goal is to **grow from 500 school to 800 schools** (including 75 At-Risk schools), reach 5,000 registered students, have 400 students participate in the Dollar-a-Day Challenge and have at least 500 teams compete in the Stock Pitch Competition. After a great first quarter, we are well on our way to reaching these lofty goals and increasing our impact.

## Conclusion

Times are not easy, but the future is bright! One reason for my optimism is when I look at the kids that participate in YIS. Just

look at the YIS Student Advisory Board! We had an outpouring of applicants to participate in the leadership board this year, and we selected 52 Youth YIS Leaders from all over the world to lead the organization, with **Saumya J.** from Bellaire, Texas serving as the President.

To each of our YIS volunteers and teachers, I wish to you all, first and foremost, health and safety.

Thank you for all you do to give back and make a difference in the lives of kids. For kids like Siddhant, our impact cannot be underestimated. I'm looking forward to another great year!

Sincerely,

James

## YOUNG INVESTOR SNAPSHOT

Young Investors Society 2019-2020 Elected Student Advisory Board Officers



President  
**Saumya J.**  
Bellaire High School,  
Texas



West Coast VP  
**Chantel G.**  
Westlake High  
School, California



Mid-West VP  
**Neha B.**  
BASIS Scottsdale,  
Arizona



East Coast VP  
**Rushikesh M.**  
Bridgewater-Raritan,  
New Jersey



North Asia VP  
**Keilyn T.**  
Shibuya Makuhari  
High School, Japan



South Asia VP  
**Nirvin K.**  
International School  
Bangkok, Thailand



Secretary  
**Saurabh K.**  
WT Woodson,  
Virginia

**MISSION:** YOUNG INVESTORS SOCIETY IS DEDICATED TO PREPARING THE NEXT GENERATION OF INVESTORS. OUR MISSION IS TO INSPIRE YOUTH TO BE OUTSTANDING INVESTORS – INVESTORS IN COMPANIES, INVESTORS IN THEIR COMMUNITIES AND INVESTORS IN THEMSELVES.