

## BEANBAGS AND A BUSINESS PLAN

### Putting YIS on the Map

This quarter Young Investors Society attended our first professional conference, the California Conference of Social Studies Teachers (CCSS). Going in, we said if we could get 15-20 schools interested for next year that would be a success, and frankly, I was skeptical if we would even get that. How were we going to convince teachers to sponsor YIS?

Well, we ended up blowing all of our initial expectations out of the water. We signed up over 40 teachers that were interested in hosting a YIS next year! The excitement about YIS was undeniable. The most common line from teachers was "I wish they had a program like this when I was going to high school" or "Of course I'll host it, I want to learn this material for myself". I walked over to the JumpStart booth and they said "Oh, Young Investors Society. I've been



hearing all about your program from other teachers. Tell me about this Dollar Investment Program". So there we were on our first big stage, speaking to real teachers, side by side other existing programs, and we were crushing it! I'll give part of the credit to our bean bag tossing contest (brilliant idea, Layne!) and the rest of the credit to the fact that we have a really awesome program and teachers are recognizing it.

The two words that I think best describe our first event:

1. **Validating.** Validating because clearly we are on to something that resonates with schools.
2. **Terrifying.** Terrifying because this could get very big fast and we've got to be ready.

### Getting Ready for the Main Events

In May, YIS will host its first series of stock pitch

## ONGOING PROJECTS

**Website V2.0:** When: End January. Who: Achint and Luutaa team.

Cost: \$4,000 (+\$2,500 to build in app form)

**Video Filming:** When: February or March. Who: The Viewfinder LLC

Cost: \$3,500

### Marketing Videos:

When: 1Q16: Who: Nathan Frisk, Head Start Video.

Cost: \$500/each

**Insurance / Legal:** In discussions, currently receiving quotes

**Gala:** In discussions, currently receiving quotes

### Teacher Training

**Videos:** Summer 2016

competitions, and the kids are gearing up for it. This will be our flagship event for the year. It will be a great opportunity to showcase what the kids have learned during the course, and be a capstone on our first year. The Competition will be held the second week of May in high schools in Massachusetts, Pennsylvania and Southern California.

### Fundraising

Last quarter we started discussions on fundraising and since then Jane

and the development committee have narrowed down our core list of founding sponsors and are putting the final touches on our marketing materials. We anticipate signing up our first core founding sponsors by the end of summer.

### Lesson Plans keep Getting Better

This past quarter, after receiving input and edits from the board, we made public our first seven lesson plans. Then, guided by our experienced educators,

Becky Leah and Mike Zisa, the curriculum committee formatted our lesson plans into an easy to approach format for teacher use. We have also been putting together engaging and animated presentations in Prezi to go along with each lesson plan, resulting in a much more user friendly lesson plan for teachers and a more engaging presentation for kids. With these changes our curriculum is closer to turnkey than ever before.

### New Team Members

This quarter we welcome another valued educator to our team.

#### Becky Leah

Becky is a former middle school teacher with experience in the non-profit sector as well from her time running a non-profit that helped underprivileged students attend summer camps. She hit the ground running, making valuable contributions to both the education and curriculum committees already.

### Happy Birthday YIS!

It's strange to think that it was just a year ago that I decided to take the leap changing YIS from a concept for a reality. So much has been accomplished in just one year!

- We were granted 501C3 non-profit status
- We've assembled a world class board
- We've written a fantastic curriculum including a year's worth of lesson plans
- We've developed the framework for our programs: after school clubs, the stock pitch competition, and the Dollar-A-Day challenge.
- We've successfully partnered with Robinhood, Wall Street Survivor, Wharton High School, RubicoIn and the World Federation of Young Investors.
- We've changed a hundred young investors lives.

It has been a whirlwind of a year, and sometimes overwhelming, but as we share the message of YIS and see the excitement as students Learn, Invest and Inspire, it makes it all worthwhile. None of this would be possible without you. Thanks for standing by me on this journey.

Here's to Year Two!

-James

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