



1ST QUARTER 2017 NEWSLETTER

YOUNG INVESTORS SOCIETY

MEETING WITH A SHARK

Mark Cuban & YIS

If you had told me a year ago that we would be flying to Dallas to meet with Mark Cuban for YIS I would have said you were crazy! But a lot can happen in a year. In person, Mark was outgoing, energetic, kind and gave insightful advice. Thanks to so many of you that made the event possible!

I think one of my favorite moments from the interview with Mark Cuban was near the end of our interview (at 36:46). It was after we had showed him Grant's stock report and he was really impressed by all the kids were learning. I mentioned that one main takeaway for me since

starting YIS has been how amazing these kids are. And he said "Of course! All kids are amazing! We just need to give them confidence to go out there and give them a shot. Really, congrats on what you guys are doing."

His response brought to my mind the YIS founding story of Edgar's letter. When we consider that two years ago we were motivated to start YIS because a kid named Edgar said he had never been given him a shot, and now to hear Mark Cuban congratulating us because we had created a program to give these "amazing" kids "a shot" and "the confidence to

succeed" shows how far we have come. It is another major milestone for us.

Schools Update

We now have 53 schools signed up at Young



ONGOING PROJECTS

MyYIS App. Who: Achint and Luutaa team.

Cost: \$2,500

School Support:

Part time staff (Romina and others) and hiring of our first full time employee.

Grant writer (s):

Robert Johnson has been hired, \$500 for first grant application. More to come.

Dollar-a-Day

Matches: Goal to sponsor 50 kids in 2017 = \$18,250

Fundraising Gala: In discussions, potentially 1Q18.

January 16, 2017

Investors Society with **nearly 400 students registered** on MyYIS portal and we estimate close to 700 students have been through at least one lesson this year. Coming from 6 schools last year, the 8x growth has been tremendous. The sign ups and the ongoing support has frankly been a lot of work, maybe more than we anticipated and we're still learning how best to retain and engage the students and teachers, but the good thing is that we're continuing to learn and improve. I think what we offer – *financial literacy taught with a long-term perspective from real investors in a way that engages teens* – continues to strike a vein with teachers and students alike.

Stock Pitch Competitions

It's what we've been building for all year, and in the second week in May we will be holding the first round of stock pitch competitions. We will hold state competitions in Massachusetts, Pennsylvania, New Jersey, and California, with additional participants from Hawaii, Canada, Hong Kong, Michigan and Utah. Over 60 teams have signed up, which is also 6x more than last year. All in all, it's exciting to see how much we've been able to grow this year, which is all the more impressive considering we have had no full time staff.

Full Time Hire

That being said, we believe that the time has now come to take the plunge and hire someone to work full time and take YIS to the next level. This is one the biggest decisions that we have made yet, and getting the right hire is crucial. We anticipate that there will be further full time hires going forward as well.

We've set up a Selection

Committee to interview the candidates, and we've received strong interest from several dozen potential candidates already. We

hope to have someone hired by the summer.

Fundraising

The hiring of a full time employee will require a continuation and even a pickup in our fundraising efforts. This quarter we raised \$5,000 in corporate donations and had another \$15,000 pledged from individuals. The \$5,000 received was from First National Bank of Layton Utah, a wonderful contribution.

Other conversations have been ongoing with American Express, CFA Institute, and Fidelity, among others. We have also seen some good traction from our grant writer, Robert Johnson. He has completed our first LOI to the JM Foundation, and now we have a working template written which will allow us to apply to many more foundations in upcoming months. We know

we're still a young organization, and will be early for many foundations, but even still Robert thinks there is much to be optimistic

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about when applying for grants. Our program meets the need of three key areas that appeal to donors: education, financial literacy, and teens, and we do it through a program that creates long-term, valuable habits.

Claudio's Book

We also had the exciting news this quarter, with the launch of Claudio Brocado's book "Against #Shorttermism: A few lessons on the importance of long-term corporate culture". Claudio has generously donated the profits

from the book to YIS, and we're excited to have another YIS book in our library now. Thank you, Claudio!

Board Members

It's so inspiring to see the team at YIS continue to grow and evolve. I am so grateful for all of your work and support. This quarter, we are promoting two

volunteers to full board positions, Derek Westra and Bryan Jack.

Derek Westra.

Derek has

brought leadership and experience to the YIS Marketing Committee. Derek currently works as a Director of Communications and Marketing for the LDS Church, where he led many social media and advertising campaigns. He has also done marketing for various start-ups, including part of the early team of Qualtrics.

Bryan Jack, CPA. Bryan has done a tremendous job this quarter, on bookkeeping and fundraising efforts, as well as reaching out to schools in his area in Utah. As we begin applying for grants, we knew that we needed to ramp up our accounting efforts and Bryan has gone above and beyond. Bryan

will support Andy Davis who remains the treasurer of the board.

Conclusion

It's been another fantastic quarter. As always, I just

want to express my enormous thanks to each of you. Without you, none of this would be possible. Interviewing a celebrity and billionaire like Mark Cuban this quarter is a reminder of how powerful our program can become. I am sure that this is just the beginning of a great journey.

I also can't wait to see many of you during the stock pitch competitions in May, as well as

during the board onsite next quarter in New England.

Here's to another great quarter!

- James

P.S. This quarter, I'm starting something new in my letters. I thought it would be interesting to regularly highlight one of the awesome students from the YIS community to see what they're up to on the MyYIS portal.

YOUNG INVESTOR SNAPSHOT

Name: **Abdul Abbas**

School: **Brockton High School, MA**

Online Rank: 1/370 students

Last Stock Pitched: **Biomarin**

Pharmaceutical

Rationale: "Looking at the company, I can see it doing good on their research in the future."



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.