

## YEAR ONE IS IN THE BOOKS

### Stories of Success

This May, YIS hosted its first ever National Stock Pitch Competition In Los Angeles, Massachusetts, Pennsylvania and Southern California also hosted preliminary statewide competitions. All those in attendance were blown away by the quality of work and what amazing experience it was for the kids. I think our short video did a pretty good job of capturing the excitement from the kids. I hope you all have seen it!  
<https://www.youtube.com/watch?v=jXxibJYxAA0>

There were countless stories of success that came from the competition. One of my favorites came from a boy named Grant Williams. He is a junior from Agoura High School in Southern California and one of the nicest kids you will ever meet.

I was sitting in the library of Bucks County

Community College



waiting for the Pennsbury, Pennsylvania stock pitch competition to start, when I got a call from Grant. Seeing as how the event was about to start, I declined his call and put my phone back in my pocket. He called again, and then again! On the third call time I thought to myself, "ok, this must be an emergency." So I stepped outside and took the call. I was immediately greeted by an energetic, "Mr. Fletcher! I am so excited right now! I just had to call you! My dad was so impressed by my stock pitch report on Pfizer that he showed it to his friend, who is a partner at a private equity fund, and they were so impressed that they offered me a paid internship for the summer! Can you believe it?!"

What's even more amazing is that two of our five stock pitch finalists received paid summer internships as a direct result from their stock pitch reports (Katia, the National winner, and Grant). That puts our placement rate at 40% of

## ONGOING PROJECTS

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

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

**Video Filming:** When: July 12. Who: The Viewfinder LLC  
Cost: \$3,500

**Prezi Presentations:**  
When: End of summer. Who: Alejandro Colorado,  
Cost: \$200/each

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

**Part-time Interns:** Two, currently working 15 hours / week

**Fundraising Gala:** In discussions

the finalists! This type of success is unheard of for high school students, and further proof that what these kids are doing is groundbreaking and very valuable for their future.

Finally, I wanted to say thank you to all those that made the National Stock Pitch Competition a success.

The amount of effort and hours that were contributed truly blows my mind.

“YOUNG INVESTORS SOCIETY IS LIFECHANGING.”  
(BRENDAN, YIS MEMBER)

### Sights on Next Year

With the successful completion of the first year, and a LOT of lessons learned, we are really excited for the rollout of 50 schools this upcoming year. We aim to build centers of strength in the states of California, Massachusetts, Pennsylvania/New York Washington DC and Utah. Here are the main things we are doing to prepare for the big year ahead as we scale from 6 to 50 schools:

- Everyone is reaching out to schools in the area and creating a list of prospect schools.
- I attended a teachers conference sponsored by Wharton and told the YIS story. Afterwards, 15 teachers

registered and committed to sponsoring a YIS chapter.

- We are preparing teacher-training videos in an effort to streamline teacher education, and to make sure teachers feel supported.
- A teacher dashboard section

is being completed as part of Website 2.0.

- The new Lesson plans

(which are more turn-key and teacher focused) are nearly complete.

- Prezi presentations are being completed for each lesson.
- We hired two part-time interns whose main efforts will be focused around teacher onboarding and school support.
- We are fundraising to be able to hire one full time employee to support all the growth.

It has been a tremendous amount of work, but we excited with how things are coming together. I believe we are laying a foundation that will be able to support thousands of schools in years to come.

### Fundraising

We held many successful meetings this quarter in our efforts to reach out to corporate sponsors. The feedback has

been positive and very promising. Fidelity, talking about YIS, called us, “innovative” and said “in a short period of time they have put up multiple wins on the board”. Even with such positive feedback the fundraising process will take longer than initially expected. This quarter, we held successful preliminary meetings with Fidelity, Capital Group, Wharton, and Robinhood. The outreach efforts will continue to be an ongoing process.

This quarter we raised \$40k in donations (\$15k in checks, \$25k pledged), which makes it our largest quarter of contributions yet. The proceeds came primarily from board members. Thank you, from the bottom of my heart. We truly treat each dollar donated like “the widow’s mite.” (For confirmation of our frugality, just ask Lee what the definition of a penny pincher is. He will probably respond “James”)

### Onsite Board Meeting

Thank you to all those who were able to make the trip out to Southern California in April to celebrate the one-year anniversary of YIS, attend the onsite board meeting, and host the junior advisory board meeting. The whole weekend was extremely productive, fun and worthwhile.

### New Team Members

This quarter we added some meaningful new people to the YIS team.

The first accomplishment is that we hired two part-time interns this summer, **Nathaniel Driggs** and **Kacey Donahue**. Both were extremely impressive YIS members, and are recent high school graduates. If your committee needs some extra work done this summer, they will be available to help. Layne is overseeing their projects this summer.

**Melissa Dunn (Missy)**, who is Dave's sister, comes to us with a great background in online marketing campaigns. She has volunteered to work 1-2 hours a week with George on the Marketing Committee.

**Jane Funk** is a graduate from Georgetown University in English Literature, and has worked at an online writing center as a tutor. She has volunteered to work 1-2 hours per week as a grant writer for us.

We have also promoted **Mike Zisa** to be the Chair of the Curriculum Committee. Congratulations to Mike, and thank you all for your time and the donation of your talents.

**Don't' Worry, I'm ALL IN**

Lastly, as many of you know, I will be moving to Hong Kong in August. I was approached earlier this spring with an amazing job opportunity in Hong Kong. After much prayer and deliberations on what would be best for my family, and thinking very seriously about the impact a move would

have on YIS, my family and I have decided to go for it. We are moving to Hong Kong. On the upside, this has given me much of the month of June and July to work full time for YIS to produce videos, attend conferences, and prepare for next year. I also envision this as a springboard into YIS Asia. Lastly, this will increase my industry credibility as well my financial means to support YIS on a bigger scale. It is my firm belief that this move will be a long-term positive for YIS. I hope everyone knows that I am fully committed to YIS. I will fly back for events,

attend conference calls, and continue to lead the outreach efforts. YIS is something so much

“I WAS SO IMPRESSED BY YOUR PRESENTATION. I BELIEVE THE INFORMATION YOU ARE MAKING AVAILABLE THROUGH YOUNG INVESTORS SOCIETY IS SO ESSENTIAL FOR ALL YOUNG ADULTS”  
(DEBBIE OUYANG, TEACHER, WHARTON HIGH SCHOOL CONFERENCE)

more than a hobby to me. I truly believe it is an avenue to change thousands of lives, and I want everyone to know loud and clear that I am still 100% “ALL IN!”

With that

being said, I feel that YIS is at a place where I am able to take a step back a bit. We have so many great people on the board and are adding volunteers. I wouldn't take this job in Hong Kong, if I didn't feel like YIS was at a stable place. During this time I will need to lean on all of you a bit more. It's a pivotal time for our organization to mature, and grow to the next level. I know we can do it! Thanks so much all of the support.

You all are the best!

-James