



1ST QUARTER 2018 NEWSLETTER

YOUNG INVESTORS SOCIETY

FINISHING STRONG Season of Competition

It's the beginning of an exciting time at Young Investors Society, the season of competition has begun! It's a time of so many emotions: nervousness, excitement, stress, joy and sometimes heartache. I'll never forget one state competition last year, after announcing the winning team, I walked out in the hallway and saw one young man crying to himself with his head in his hands against his locker. I congratulated him on a job well done and encouraged him for next year, but you could see how much he had wanted to win. Hopefully it motivated him to prepare even harder the following year.

It's led me to think of what it means to compete. We've had many times at YIS this year where we've been that

young man crying at his locker in defeat. But we've also had many other times where we're high-fiving each other after a hard-fought victory. The truth is that we are in a constant competition for kids' attention, for teacher time, for guest speaker's participation, and for donor's support. I think at times we've asked ourselves "Why is this so hard? Why don't teachers and students and donors sign up by the masses because of how great our program is?" Sometimes it feels that we are outmatched, such as a call we had this quarter with a large foundation that said to us, "we have \$100 million dollars in grants ready to spend to support teenage financial literacy



ONGOING PROJECTS

NYC Fundraising Gala / Investment

Symposium: May 3rd, 225 Liberty St.

Brookfield Place (BNY Melon building)

MyYIS App. Who: Achint and Luutaa team (iOS & Android)
Cost: \$2,000

Dollar-a-Day

Matches: We sponsored 11 kids for up to \$365 each in 2017/2018.

Program

Development: Will pilot a CYFA test this summer.

programs, and we think your program is amazing but... we just can't give you money because you're way too small".

The stock pitch competitions remind us that if we continue to prepare well, present effectively, and never give up, then we are going to succeed. We'll win some, we'll lose some, but it's all part of the competition! The memory of the student crying at his locker also reminds me that in spite of all the growing numbers and as big and successful as YIS becomes, it still all comes down to the kids, one by one, and the individuals whose lives we can impact and inspire.

Stock Pitch Participants

This year we had 46 teams (76 individuals) participate in the Global Stock Pitch Competition. That's about 2x as much as last year! Participants came from the states of CA, MA, NJ, NH, OH, NV, PA, NY, and the countries of

Malaysia,
Hong Kong
and our first
ever from
Pakistan
won the

**"I CAN'T BELIEVE THAT
THESE ARE JUST HIGH
SCHOOL STUDENTS!"**
(STOCK PITCH COMPETITION JUDGE)

Online Competition! It is always so inspiring to see the fruits of all the students work come together. It really feels that every year the stock pitch reports and the presentations are getting better

and better, which is a great sign. Our judges continue to be blown away and as one said "I can't believe that these are just high school students!"

YIS added 12 new schools this quarter to reach 133 schools as we continue to grow, with an average of 7 students per school.

Preparing for NYC

2018 will mark the first year that Young Investors Society will host a Gala fundraising event. We are calling it the "Invest in the Future Event – A Night With Young Investors Society". It will be hosted at BNY Melon building in downtown NYC. Oppenheimer's CIO Krishna Memani will be the keynote speaker, and star portfolio manager Justin Leverentz will be giving the keynote on Friday at the Stock Pitch Finals. Broadway star N'Kenge (from Motown Musical" will be performing on the May 3rd Event and actor Morgan

Freeman may even give a video speech to the kids. It's the result of a lot of

time and effort to plan a great gala event and the stock pitch finals, but it's really coming together nicely. I'm excited to announce that we've already raised over \$40k in corporate

donations for the event from IIFL, Jeffries, CLSA, BTG and we expect to add a few more sponsors in coming days. It'll be a wonderful time to reunite with many of the team, YIS partners, and give support to these amazing kids who are flying in to participate. I truly can't wait!

Fundraising

This quarter we raised \$19,000, and we've since added another \$35,000 in April. That makes it by far the biggest two months of fundraising ever at YIS, which will help enormously as we prepare for next year's budget and continue to grow our program. I've been impressed to see corporates step up to buy tables and invest in our program and the kids, and I'm also excited for the connections that we've been creating through the event, such as CLSA offering to sponsor an at-risk schools initiative in the US for next year.

We also submitted four grant applications this quarter, Gould Family Foundation, Ambrose Monell Foundation, Fidelity Investments, and Bank of America.

A Team Effort

In the run up to the Stock Pitch Competitions and NYC Events, it'll take everyone's support to make the events a success. I'm so grateful for the time that was put

into the State Competitions. This was actually the first year that I didn't do my "YIS World Tour" to attend each State competition. And it was a huge relief to see everything go smoothly and each state to host great events! Thanks to Christine, board members, teachers and volunteers from all over the country, who helped plan and make each event a phenomenal success and one that showcased the students' achievements.

The planning for the New York events has also been a lot of work with weekly calls on our planning committee, but I'm so grateful for all the time and effort. Please make sure that you don't miss the chance to invite those that may wish to donate or attend. It's a great time to raise money, spread the word and also

help new people get involved with YIS.

Onsite in June

The YIS Annual Board Onsite will be held on June 29-30 in Southern California at the Mandalay Bay Beach Resort in Oxnard. It'll be a beautiful location and a wonderful time. This will be a great chance to gather and plan the direction for YIS for the years ahead. We have some crucial decisions to make regarding the curriculum, the best way to grow, and the business model of YIS. I hope to see you all there, and I look forward to the discussion and your insights!

Thanks to all for another great quarter! It is such an honor to be associated with such fantastic group. There is no one I would rather be on a team with,

competing alongside of, winning some, losing some, but always staying focused on giving back and making a difference!

I can't wait for May 3rd and 4th!

- James

YOUNG INVESTOR SNAPSHOT

Name: **Cameren K.**

School: **Waianae High School**

Winner of the Hawaii State YIS Competition



MISSION: THE 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.