



YOUNG
INVESTORS
SOCIETY

3RD QUARTER 2017 NEWSLETTER

YOUNG INVESTORS SOCIETY

THE START OF OUR BIGGEST YEAR YET

Wisdom from Mr. Dalio

Ray Dalio is one of the most successful hedge fund managers of all time. I've recently been reading his book "Principles" where he talks about the principles that have led to his business and investment success. One part really resonated with me and I think applies particularly well to Young Investors Society.

He said "I have a formula for success that has three parts. It is:

Dreams + Embracing Reality + Determination = a Successful Life.

You first have to dream big and prioritize. If you follow the right principles you can have

virtually anything you want, but you can't have everything you want. Rejecting some things you want in order to focus on achieving other things [you want] more is key.

On the way to your goal you will encounter your realities. You will need to know how to deal with them well. If you're open-minded and flexible enough, you will learn how to do that, typically by making painful mistakes, learning from them and changing.

Third, you need to do these things with a lot of determination. Through a lot of trial and error



ONGOING PROJECTS

MyYIS App. Who: Achint and Lutta team (iOS & Android)
Time: Oct/Nov 2017

Golf Charity

Fundraiser:

2pm October 18, Santicoy Country Club, California.

NYC Fundraising

Gala: May 3rd, 225 Liberty St. Brookfield Place (BNY Melon building)

Dollar-a-Day

Matches: Goal to sponsor 60 of the 300 participating kids in FY2018 = \$10,800

Program

Development: Will pilot a CYFA test this year based on three assigned books.

Upcoming YISLive

Interview: Mark Mobius, 8 November

and learning you will improve and make achievements that far exceed what you ever imagined possible."

I loved this formula! Dream Big, but be agile to reality and stay determined! I think it's great advice to keep in mind as we embark on our biggest year yet at YIS.

Milestone: 100 Schools

Last week we officially reached 100 schools that are offering YIS! It's a great milestone and puts us well on our way to achieve our goal of 150 schools this year.

New YIS Chapters are popping up all over the US, Hong Kong and even Malaysia now has two thriving chapters. The new schools we added this quarter (22) came from many states across the country, such as William Mason HS in Ohio, Middlesex Academy in New Jersey, and Pacific Palisades HS in Southern California.

We are now in 16 states in the US. We continue to concentrate on building centers of strength in New York City region, California, and New England, but are being surprised as schools start up where we weren't expecting it.

Some are hearing about YIS either through conferences or word of mouth and are starting up on their own. It's a good sign!

New Partnerships

We had some exciting development with partners this quarter. The first is with Stockpile. They are one of the leading investment platforms for millennials. We are now focusing our Dollar-A-Day program through Stockpile's platform, which enables students to easily open a no-fee custodial account on a PC or Mobile device and buy partial shares of stocks at \$0.99/trade (\$20 of Apple, for example). They also generously offered a promotion of \$5 free for all YIS members and teachers that open an account. Fidelity will remain as our preferred partner for RIA custodial investments.

We also announced partnerships with two key non-profits in the NYC area focused on at-risk teens, Blacks on Wall Street and World of Money. This has brought in dozens of students and many new schools in the NYC area. They have also been very helpful in getting us a venue and help plan the 2018 YIS Global

Stock Pitch Finals and Gala scheduled for May 3 & 4th, 2018 in NYC at the BNY Melon building downtown.

Onsite and Goal Setting

It was such a pleasure to see many of you at our annual onsite in Connecticut in July in a majestic setting. I came away optimistic and energized for the year ahead (I know, shocking right, me optimistic!)

I found great value in hearing the committee plans, the SWOT analysis, the student advisory board call and setting goals. In sum we set a target to reach 150 schools and 1,500 students by June 2018. It'll require a lot of work and some funds to raise, but I have no doubt we'll get there.

Fundraising

This quarter we raised \$6,500 which was down from last quarter and a bit below expectations, as a few grants didn't come through as we had hoped.

The good news I feel is that we are laying a strong foundation for the remainder of the year. On October 18th, we are excited to host our first fundraising event ever for YIS, a charity golf tournament at Saticoy Country Club in Southern California. Thanks especially to Andy, Lee, and Christine for all their work in putting this together.

"DREAMS + EMBRACING
REALITY + DETERMINATION =
A SUCCESSFUL LIFE
(RAY DALIO)

We're also excited to announce a Gala / Mixer event in New York City in May. BNY Melon has donated their large atrium for us to use. We've had some positive indications that we possibly get President and Michelle Obama to be the keynote speaker! Can you

“WE'RE LITERALLY HAVING TO TURN KIDS AND PARENTS AWAY BECAUSE THERE IS SO MUCH DEMAND TO JOIN YIS IN NEW YORK CITY RIGHT NOW”
(DENNIS CREARY, BLACKS ON WALL STREET)

introduced to YIS through Mike Zisa, and has served as a guest presenter in Mike's classes and as a judge for the YIS Stock Pitch Competition for the last two years. Kent also participated in the YIS on-site board meeting last July in Connecticut. Kent is currently working for Capital Wealth Planning. Previously he

(similar to the SIFMA's Stock Market Game). But this year is probably the most critical year for YIS in reaching these targets. This is the year we take YIS to the next level with a full-time COO, our first fundraising events, and growing in scale and attention.

How will we succeed?

By Dreaming Big, Embracing Reality and with Determination!

Thank you all for all that you do. You have no idea how grateful I am and how much of an impact your contributions have.

- James

imagine!? We'll see, but either way it is shaping up to be a great event, fundraising opportunity and a chance to build awareness.

In addition to these fundraising events, we continue to submit grant proposals, with four submitted this quarter, and more to come.

Board Members

It's always inspiring to see the all-star team at YIS continue to grow. I think our board of directors and talented volunteers are second to none.

Kent Elwell We are excited to welcome Kent Elwell as a new board member of YIS. Kent was

was a Senior Advisor Consultant and Vice President for Oppenheimer Funds for more than 23 years. Kent will be a great fit and a wonderful asset to YIS.

We also announce that Rory Olsen will step down as a board member of YIS. Rory has limited times as he is now the CEO of a robotics company. We wish him all the best in his new endeavor and thank him for his contributions to YIS over these past 18 months.

Wrap Up

By 2020, I think YIS will be in at least 1,000 schools with 25,000 students. By 2030 I think we'll be at 1 million students per year

YOUNG INVESTOR SNAPSHOT

Name: **Chris Mann**

School: **John Stark Regional High School, Weare, New Hampshire**

Online Rank: 30/649 students (He completed all lessons in two weeks!)

Last Stock Pitched: **ROKU**

Rationale: "Own a couple of their products, believe they have a great margin for growth with a high floor."

