

## IF YOU THINK YOU CAN...

## Reaching over 400 Schools

I recently read Henry Ford's autobiography and one of his famous sayings was "If you think you can do a thing or think you can't do a thing, you're right." For YIS these days, we certainly think we can.

We're halfway through another record breaking year at Young Investors Society. This quarter was quite extraordinary, **we added 78 new schools to reach a total of 408 schools.**

Putting this in perspective, last year at this time YIS was in 192 schools; we added 216 new schools over the past 12 months, more than doubling the number of schools reached. The number of students and lesson downloads are also doubling. It's all pretty

mind blowing! Even more significant is the fact that many of the new school sign-ups are coming organically on their own, from word of mouth of students and parents. I remember in the early days of Young Investors Society, board member Claudio Brocado said "*It'll be challenging at the start, but one day I believe YIS will begin to snowball on its own*". We not quite there yet, it still requires a tremendous amount of work to add new schools, but the accelerating growth driven by word of mouth and rising global awareness of YIS is definitely a positive sign. It all points to the fact that we're really making a difference and that kids and teachers love it!

All the growth is exciting, no

doubt. But the next questions become: How will we rise to the challenge of supporting this growth and all the wonderful new students that enter YIS? And how will we prepare YIS to



## ONGOING PROJECTS

**Dollar-a-Day**

**Matches:** We sponsored 50 kids during the 2018-2019 school year, and target to sponsor 100 in 2019-2020, along with 50 "Start Investing Now" sponsorships.

**Program****Development:**

Recently published 23 new lesson videos. Implementing these on our MyYIS portal and Edmodo.

**IT Support:** We are adding a new IT support team.

**NYC Gala:** Evening of May 14<sup>th</sup> at the University Club, Keynote speaker: Kate Moore, Chief Equity Strategist at Blackrock

be able to one day support not just 400 schools, but 4k schools or even 40k schools?

### FY2020 Initiatives

Coming out of the Board Onsite in July, we set a couple of key priorities for this year which were 1) to **hire a Director of Business Development (Fundraising)**, 2) to increase student participation in the **Dollar-a-Day matching program**, and 3) to launch an **Asia Stock Pitch Competition** in addition to the US Stock Pitch Competition. We are happy to report that we made significant progress on each of these items this quarter.

The first is the **hiring of Justin Shoup, as Director of Business Development for YIS**. He comes to YIS with some excellent experience in sales and fundraising (he helped raise \$1.5mn at Charity Golf Tournament) and with some great ideas on how to increase both awareness and fundraising for YIS. We are so thrilled to welcome Justin to the team! He will be based in Colorado, where he lives, but will be reaching out to contracts and the plan events globally.

“IF YOU THINK YOU CAN DO A THING OR THINK YOU CAN'T DO A THING, YOU'RE RIGHT”  
(HENRY FORD)

For the second item, it was wonderful to see that this year we had **134 Dollar-a-Day essay submissions** (up from 50 last year) and in addition had another 67 participants in the “Start Investing Now” promotion that awards prizes for just opening a brokerage account. We still want to get many more thousands of kids involved, but this is a great start.

And lastly, we are happy to report that YIS Asia is growing significantly, and we are planning to host an Asia Stock Pitch Competition on May 8th and 9th where the winning teams from six countries will fly out to NetDragon's Campus in Fuzhou, China for Investment workshops and the chance to be crowned the Asia Stock Pitch winners, hosted and sponsored by YIS founding sponsor, NetDragon

& Edmodo. All of this progress would not be possible without our incredible board, volunteers and partners around the world.

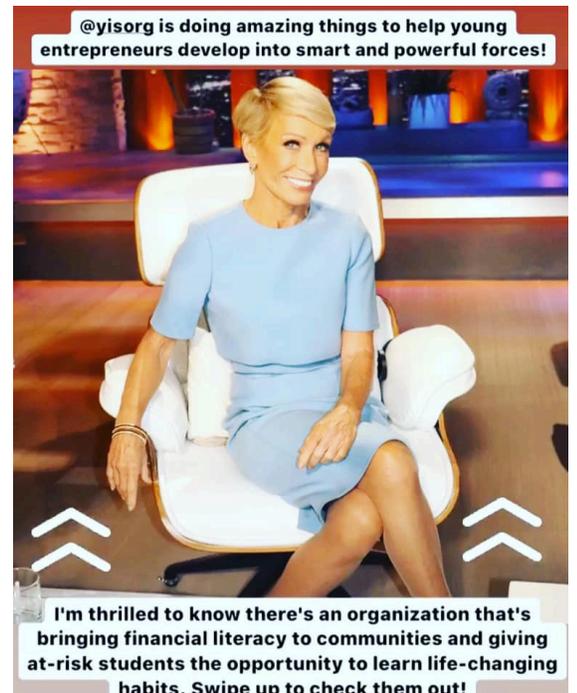
### Shark Tank Contest

We're also looking forward to the upcoming **Shark Tank Contest with Barbara Corcoran**, real

estate mogul and Shark Tank star. The event will take place February and the kids are preparing their contest entries now.

### Hong Kong Investment Symposium

On January 11, 2020 we held what I believe is the largest gathering of YIS students yet in one venue, as nearly 100 students gathered in Hong Kong for an Investment Symposium, sponsored by Credit Suisse and Edmodo. One great achievement from the event was that we had students from 21 different schools who came to participate in the workshops. This will help create awareness and build a YIS Community around the city. Multi-school events held in Southern California have also been a model to get kids from



different schools together to create a YIS community. After the success of the Hangzhou Symposium last quarter and the Hong Kong Investment Symposium this quarter, we may have identified a great model to build awareness and grow YIS in a particular region through a half-day event.

### Fundraising

This quarter we raised \$35k, which brings our total for the first half of the year to \$72,650. Our budget is \$230k for the year, so we are running a bit behind. We have \$60k of upcoming sponsorship checks we'll receive in January and the NYC Fundraiser in the Spring, so we have visibility to get there. The funds are so crucial right now and go a long way to supporting the strong school growth as we target to match Dollar-a-Day

Grants for 100 students, and the expenses to put on the New York and Asia Global Stock Pitch Competitions. We're especially excited to have Justin fully dedicated to fundraising now, as the organization reaches critical mass and hits the five year track record. We are also happy to have completed a clean audit by FJ Associates who provided audited Financials for 2018, and will soon complete for 2019, which will also help in the grant process. Thank you to the generosity of the board members, advisory board members, and organizations that believe in the mission and impact of YIS.

### Conclusion

Finally, I hope everyone is subscribed to the YIS monthly Newsletter. [Here](#) is the latest. Christine and our amazing 20-member Youth Advisory Board do a fantastic job of putting this together each month highlighting activities, club spotlights, stock ideas, and upcoming events. It really

makes you feel the energy of the YIS community.

Thanks again to all of you! We're entering the busy Spring season for YIS as we prepare for the YIS Shark Tank Contest in February, the Regional Stock Pitch Competitions in April, followed by the Global Finals in May. And like Henry Ford's quote, if we think we can, we're right, and I honestly think we're on a journey to impact millions of young lives.

The snowball is rolling!

- James



### **YOUNG INVESTOR SNAPSHOT**

"Our chapter has been a huge success in the small time that it's been active! So far we have over 20 members and both our teacher mentor and principal just announced that due to the huge student interest, Grimsley High will start a formal Investing and Financial literacy class next year! We are so excited that YIS has made such a great impact!"

Natalie K.  
Grimsley High School,  
North Carolina

**MISSION:** 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.