

ANOTHER INCREDIBLE YEAR!

Stock Pitch Competition

First off, I want to thank everyone for making the fourth year of Young Investors Society such an incredible success!

It was such a privilege to see 18 teams from across the country, Malaysia, Hong Kong, and Australia compete in the Global Stock Pitch Competition on May 17, 2019, in New York City. The Global Stock Pitch Semi-Finals, sponsored by NASDAQ was held at the NASDAQ headquarters in downtown NYC. Four teams then moved on to the Global Stock Pitch Finals held at New York University. YIS students flew in from across the globe to attend Investment Workshops, our Investment of a Lifetime event, and the Global Stock Pitch Competition. The competition

was intense and everyone did a truly exceptional job!.

We are proud to announce the winners of the 2019 Global Stock Pitch Competition:

- **First Place: Wesley P.** (BASIS Scottsdale Charter School, Arizona)
- **Second Place: David B. & Saumya J.** (Bellaire High School, Texas)
- **Third Place: Cole W. & Jared S.** (Thousand Oaks High School, California)
- **Fourth Place: Christian M. & Robert K.** (Pennsbury High School, Pennsylvania)
- **President's Award: Morgan S.** (Stargate Charter School, Colorado)
- **Best Oral Presentation: Marissa R.** (William Mason High School, Ohio)



July 18, 2019

ONGOING PROJECTS

Dollar-a-Day

Matches: We sponsored 50 kids during the 2018-2019 school year.

Program

Development: Filmed lesson videos on April 26-27 in the NetDragon film studios in China. The videos are now in production by a freelancer from San Francisco.

IT Support: We are aiming to build an improved YIS Mobile App by end of August.

Additional Hires: We are considering hiring a part-time Outreach Coordinator as well as a part-time Director of Fundraising / Grants.

- **Most Creative Presentation:**
Pranay B. (East Brunswick High School, New Jersey)
- **Most Creative Presentation:**
Ethan P. & Oscar E. (Sydney Grammar School, Australia)
- **Student Leadership Award:**
Christian G (Westlake High School, California)

There were so many moments that came out of these events that I will never forget. One special moment that stuck in my mind was when **Christian from Westlake CA**, stood up at the *Investment of a Lifetime Celebration* and shared his story how despite coming from a poor background he helped pay for the down payment on his parents home through the money he had saved and invested. Another moment was when the **father of Marissa from Ohio** came up to me with tears in his eyes thanking me for a program which has given his daughter confidence, leadership skills, and a passion for business. These are the moments

that remind us of why we created YIS. It is always so inspiring to see how the program is really changing kids lives.

Investment of a Lifetime Celebration

This quarter, we held our *Investment of a Lifetime Celebration* fundraiser hosted by The New York Marriott Downtown in NYC. We had an amazing evening with great food, and great speakers, which included **Randy Cohen**, Ph.D. Senior Lecturer at Harvard Business School and **Laura Geritz**, CEO and Founder of Rondure Global Advisors. We were able to raise awareness about Young Investors Society to over 140 people in attendance and bring in much-needed funds to continue our Dollar-A-Day Sponsorships. It was such a wonderful gathering of friends, professionals and kids.

Looking Back on the Year

When we started the year we set a lofty goal of growing from 140 schools to 300. I'm happy to report that we ended the year with 285 schools,



nearly reaching our goal, and adding 145 new schools in twelve months. We also tripled our stock pitch participation to 225 students and we estimate that over 2,500 students participated in YIS during the year (1,778 of which were registered on the MyYIS portal), awarded 50 Dollar a Day sponsorships and will have 23 students earn their full CYIA Designation!

Overall, we've learned a ton in these first four years, and experienced tremendous success. But my hope is that we never stop learning, growing and improving our program. Three items that I see a particular need to improve on are 1) **the Dollar-A-Day participation rate**, we had 50 applicants for FY19, only 3% of registered students (2) **our Fundraising Efforts** (we raised \$20k less than our goal of \$182k for the year) and 3) **increasing our reach into At-Risk schools**. I eagerly await the Board Onsite this weekend, which is always a



treasured time to come together and plan for the year ahead.

Fundraising

This quarter we raised \$23,000, primarily coming from the Gala donations. This brought the total for the year to \$159,800 in revenue. It's still a substantial sum and I am constantly in awe of the generosity of people, but it is worth noting that it was marginally less than our target of \$182k for the year. We are excited to announce though, that board member **Matt Welling, will be taking over as Chair of the Fundraising Committee** for the FY19/2020 year. We also planted many seeds that could lead to large donations, alongside Edmodo's continued support, I believe we are nearing a key inflection point in our fundraising efforts.

Board Positions

First off, we would like to welcome **Lucy Chuah** from CLSA to the YIS General Board!

Also, last quarter on the call, we discussed a rotational system for the Executive Board, so that one member would rotate out every year to give more board members the opportunity to serve

on the Executive Board and have a more active role in the organization.

As such, we would like to announce that

Jane Winslow will be joining the Executive Board of YIS, in the capacity

of Treasurer. **Lee Mackay** will move to Vice President, **Bryan Jack** will move to Executive Secretary, and **Dave Miles** will rotate off the Executive Board, but still be a board member and remain as a Co-Chair of the East Coast Advisory Board.

I would personally like to express my heartfelt thanks for Dave for all of his time and his incredible service on the Exec. Board these past years. YIS would surely not be where it is today, if not for Dave's huge contribution.

Conclusion

We have so much to be proud of as we reflect on another incredible year of growth for Young Investors Society and the thousands of lives that we were able to change this year. The future is brighter than ever, and I



am so excited to sit down at the Onsite and plan how to make our programs even more impactful and engaging than ever before. Thanks for all of the time, the flyouts, the donations, the wisdom, and the belief in our mission and the next generation! Onward and upward,

- James

YOUNG INVESTOR SNAPSHOT

Name: **Lauryn W.**
School: **Westlake HS, California**
Elected as the Student Advisory Board President for FY2020, earned the CYIA @ Designation



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.