



YOUNG
INVESTORS
SOCIETY

3RD QUARTER 2016 NEWSLETTER

YOUNG INVESTORS SOCIETY

YEAR TWO BEGINS YIS Strong and Growing

I love the picture below of Dave Miles with the YIS members at Brockton High School in Massachusetts. I love it because it represents so many things. First, many said that reaching low-income kids "like Edgar" couldn't be done with Young Investors Society, but this group of students proves that theory wrong. Dave reported back that these kids were smart and engaged! Second, it is proof of how keeping our ears to the ground and seeking out good people to

partner with (in this case, Cedric Turner at Empower Yourself) is critical. And third, simply put, we are changing lives!

Cedric wrote us afterwards and shared the following:

*Mr. Miles, it was an honor having you meet and speak with our students. Our students are now determined to go to the regional and national competitions but more importantly qualify for the dollar a day challenge. One of Empower Yourself requirements is that all of our students have bank accounts, your Dollar for Dollar match have not only inspired them **but has given them hope!***



ONGOING PROJECTS

MyYIS App. Who: Achint and Luutaa team.

Cost: \$2,500

School Support:

Part time staff paid to help process transitioning to full time position when we have funding. (on average 1 employee can support ~100 schools)

Insurance / Legal: In discussions, currently receiving quotes

Gala: In discussions, but pushed back from 1Q17.

October 31, 2016

Young Investors Society does many things, but first and foremost it gives "hope". As YIS grows one of our purposes is to become this bridge between financial professionals and kids like those in Brockton. I have no doubt that thousands of lives will be changed. It's our privilege to be there with these kids and bring them this "hope".

From Six to 50 schools

Growing from six to 50 schools this year will make us the fastest growing high-school club in the US (+733%). But recruiting and onboarding schools is no easy feat. Layne as COO has done a phenomenal job leading the charge, and many of you have stuck your necks out and given many hours in reaching out to schools as well. Thank you!

Our biggest recruiting success seems to have come from attending teacher conferences. I attended and spoke at the Wharton High School conference this summer, and Layne attended and spoke at the Council for Economic Education Conference in October. At the close of each of these conferences we had interest and contact information from over 60 schools.

Currently we are at about 30 schools signed up so far. We've got a good pipeline of leads and

interested schools, and enlisted specialists such as Margo White in California (retired from Junior Achievement) to help in the outreach and onboarding process. Layne is attending the Jump\$tart Conference next week in Texas. So we'll be close to our goal of 50, which is really exciting! That's about 1,000 kids that are getting a leg up for college already because we decided to give back and build YIS.

Polishing our Product

I hope everyone enjoyed the demo we had of the material last month. It is really exciting to step back and look at what we have created - all of us! This last 12 months has been a herculean team effort: creating the content, writing the curriculum, taking in feedback from students and teachers, and countless hours of planning, writing, filming and editing. We can confidently say that as a result of our efforts we now have a quality, one-of-a-kind product:

- Our Lesson plans have been revamped.
- Module 1 was created to add an Introductory unit.
- Prezi's have been created.
- Our Video series is out.
- MyYIS Portal is up and running.
- Teacher training videos were created.

As Lee said the other day on a call, "there is no doubt that we've got a sexy product. Now we just need to be smart in how

we roll it out and who we partner with". He's totally right.

We'll also need to stay hungry to continuously improve and innovate and learn, learn, learn. Like Japanese Kaizen, always improving!

Partnerships & Fundraising

As you know, we've begun reaching out to select corporations to come on as partners and founding sponsors. I'm certain that we have a powerful program that will attract many large partners, and as such we are setting our sights on the best-of-the-best, especially for those that will be our Founding Sponsors. In that regard, we have had some real success.

The first founding sponsor to come on officially was the top finance school Wharton, through the **Knowledge@Wharton High School**. Lee and I had a good meeting with them in the Spring, and the agreement was to share content and they would help us reach teachers through their conferences and events.

The second founding sponsor that we expect will come onboard shortly is the **CFA Institute**. I met with their CEO Paul Smith who happens to be based in Hong Kong, and they were thrilled about what YIS is doing and avenues for partnership. CFA will be a financial contributor through sponsoring events and prizes.

The next founding sponsor that we are in discussions with is

Fidelity. They have already helped us with many introductions and we are currently going through the grant process with them.

And lastly, after Layne attended and spoke at the CEE (**Council for Economic Education**) Conference last month, we are in discussions of content sharing and outreach partnership with CEE, the national body for financial literacy standards in the US.

There are many other partnerships in various stages of discussions as well. But all in all, our "dream team" appears to be coming into place nicely. CFA affiliation gives us highest credibility in the eyes of industry professionals, a CEE endorsement will make us a serious club from a teacher's perspective, and partnership with Wharton will appeal to the many students who admire their top notch finance program. These are the best of the best and will bring energy and momentum to our cause!

Founding Sponsors



(Impressive group, isn't it?)

The Team

This quarter **Geogre Kamide** and his wife welcomed a new baby! Congratulations Kamide family! Due to this new arrival, George won't have time to contribute for a while and asked to step down as Marketing Chair. We're so grateful to George and the fantastic contribution he has made to YIS! We are now in search for a digital marketing expert to fill George's shoes.

"YOUR DOLLAR FOR DOLLAR MATCH HAVE NOT ONLY INSPIRED THEM BUT HAS GIVEN THEM HOPE!"

(CEDRIC TURNER, BROCKTON HIGH SCHOOL)

Also on the talent side, **Jane Barlow** has done great work this quarter as a grant writing consultant, getting us prepared to step up our grant applications. We also hired **Margo White** as a consultant to lead the onboarding of schools in California.

Layne has also stepped us his time commitment as COO of YIS and has been phenomenal reaching out to teachers and representing YIS at conferences.

As far as skills needed, we still have a couple of outstanding gaps to fill: 1) **an accountant**, preferably a CPA, 2) **a marketing head**, 3) **an IT / website expert**

and 4) a big name **Wall Street investor**.

Keeping my Head Above Water

This summer was incredibly busy getting all our videos, lessons, Prezis and new website ready for the year, onboarding dozens of new schools, speaking with partners, all while our family

was in the middle of a move to Hong Kong. With all that has been going on, I hope that you will forgive me if I haven't

been as responsive or organized as I should be. Please know how much I value each of you. The good news is that YIS has made phenomenal progress, and we now have a product and team that I believe is second to none. Thank you for your patience and your support through this busy period! I hope that YIS stays fun for everyone. I hope that it is fulfilling. And I'm ever grateful for your contributions!

Let's keep pushing the ball forward!

-James