



YOUNG
INVESTORS
SOCIETY

2ND QUARTER 2017 NEWSLETTER

YOUNG INVESTORS SOCIETY

WRAPPING UP A GREAT 2ND YEAR

Moments to Remember

What an amazing 2nd year for YIS! We've now gone from an idea, to developing 30 great lessons, then six pilot schools and now 53 schools across 12 states and Hong Kong. Congratulations to Adele Payman from Westlake High School who was the winner of the 2017 YIS Global Stock Pitch Competition. We all watched in amazement as she delivered a nearly flawless stock pitch on the drone company, Aerovironment.

I was recently asked by a reporter who is running a story on YIS, what the most memorable moment of the year was for me. My answer was that it was seeing the kids of Brockton High School in Massachusetts participate in the state competition. Boys and girls (actually mostly girls!) coming from difficult backgrounds had prepared for months for



the event. They stepped off their school bus dressed in their Sunday best and delivered passionate and thoughtful presentations.

One young man I want to highlight is Michael Analoro (pictured below). We found out afterwards that he comes from a very difficult situation: a family with drug addictions. Tragically, Michael has seen two people die young in his home. But he found hope and meaning in YIS and our great partner Empower Yourself.

He presented the company Beckton Dickenson, and ended up winning the state competition for Massachusetts! It was an amazing achievement for him and Brockton HS.

Afterwards, he wrote me a heartfelt email. He said "I am very honored to have had the opportunity to participate in the YIS Stock Pitch Competition...I

ONGOING PROJECTS

MyYIS App. Who: Achint and Lutta team.

Cost: \$2,500

CYFA Designation: Development of the CYFA program and examination.

Grant writer (s): Robert Johnson has been hired, \$500 for first grant application. More to come.

Dollar-a-Day

Matches: Goal to sponsor 50 kids in FY2018 = \$18,250

Fundraising Gala: In discussions, potentially 1Q18, likely in Southern California.

found a love for stocks, that without YIS, I probably never would have found. I cannot express how much you have done for us without even noticing! If you ever need anyone to promote YIS I would be happy to help. I believe there

are thousands of kids that would thrive in this

“I CANNOT EXPRESS HOW MUCH YOU HAVE DONE FOR US WITHOUT EVEN NOTICING!”

(MICHAEL ANALORO, BROCKTON HS)

program and find a love for stocks and investing like I did!”

Wow! After a letter like that, from a kid as inspiring as Michael, how can we not be excited to bring YIS forward.

Stock Pitch Competitions

The culmination of the year for YIS is the State & Global Stock Pitch Competitions. This year we had 34 teams participate from 11 schools. We held statewide competitions in Massachusetts, New Jersey, Pennsylvania, and Southern California with online participants in Hawaii and Hong Kong. The winners of each of these competitions then competed in the Global Finals was broadcast live on YouTube.

Overall, it was a fantastic success and was an impressive capstone of how much YIS kids learned during the year. It was a

lot of work, and I want to truly thank everyone who contributed to these events! I went on a country-wide tour to attend most of them, and was so impressed by the YIS volunteers, teachers and students at every stop.

We're also learning and

thinking through how we can increase participation. The Stock Pitch Competition is

daunting for many students, and we didn't get as much follow through in some cases as we would have liked. For example, 60 teams registered but only 34 ended up competing. I think we can do better to motivate and support teachers and kids across the finish line. Which brings us to the next point...

Our First Hire!

Another big achievement for YIS this quarter was the hiring of our first full-time employee, Christine Tobin. After an extensive search by the Selection Committee (thanks Jane, Manny, Ben, Dave and Lee!), huge demand and over 400 applicants we found the perfect fit in Christine to run the day-to-day operations of YIS as the COO.

Christine joins YIS from the non-profit Project Heal where she was

the Director of Special Projects. Previously she was a Director for the Girl Scouts of America in California for six years. She is also a former middle school teacher with her teaching degree. Overall, she was a standout candidate because of her non-profit experience, education background and great fit within the YIS culture. Welcome Christine!

Fundraising

We had a great quarter of fundraising. This quarter we received \$21k in donations. Thank you! The big milestone was that the CFA Institute agreed to sponsor the YIS Global Stock Pitch Competition, which included grants and prizes to winning schools and students. We are proud that we have created the caliber of a program that can attract high-quality organizations such as the CFA Institute to support us. It symbolizes that we are ready to begin attracting corporate donations and I believe it is the start of much more to come.

Our grant writer, Robert Johnson also completed one more grant submission during the quarter to US Bank. I expect to have many more grant submissions successfully completed in upcoming quarters. I strongly believe YIS meets the

need of three key areas that appeal to donors: education, financial literacy, and teens, and we do it through a program that “teaches a man to fish” rather than just giving them a fish.

Looking Forward

This next year is going to be a big one for YIS! I believe it is our most important yet and will determine our long term success. Last year brought us to Mark Cuban. Where will this year lead? (Mr. Buffett? :))

We've learned a lot after our first two years, and I look forward to receiving more feedback during the onsite and upcoming calls. Making our first hire was a gut check of how committed we are to YIS. It was literally putting our money where our mouth was.

But after all of the positive feedback, amazing results and lack of financial education

programs in schools, how could we not invest?!

“I BELIEVE THERE ARE THOUSANDS OF KIDS THAT WOULD THRIVE IN THIS PROGRAM AND FIND A LOVE FOR STOCKS AND INVESTING LIKE I DID!”

(MICHAEL ANALORO, BROCKTON HS)

Overall, it's clear that students and teachers love our program. YIS graduates are loyal and eager to stay involved! But there is still much to improve. I want to better empower our committees to be able to reflect on the year, recognize our gaps and find ways that we can improve the curriculum, the teacher support, the fundraising efforts, and the ability to scale.

Board Members

It's so inspiring to see the team at YIS continue to grow and thrive. I think our board of directors and talented volunteers are second to none. You've seen some new faces attending calls and the annual onsite. It's a reflection of the tremendous outpouring of emails I have

received from people who hear about YIS and are interested in volunteering.

This quarter we announce that Valerie

Anderson will step down from being an official board member. Valerie is having her first child this

summer, and is due a break! I want to congratulate her and thank her for all of her efforts over these past two years. Her impact has been tremendous!

Conclusion

What an amazing year! After the busy month we all had during May, it's nice to take a breather and regroup. I'm looking forward to annual onsite this week as a time to reflect, to brainstorm and to prepare to take YIS to the next level!

Here's to another great year! Truly awesome job everyone.

- James

YOUNG INVESTOR SNAPSHOT

Name: **Scott Caratozzolo**

School: **Sussex Tech, NJ**

Online Rank: 4/401 students

Last Stock Pitched: **Ciena**

Corporation

Rationale: “They are extremely undersold, have good fundamental numbers, and report on the 8th.”



MISSION: THE YOUNG INVESTORS SOCIETY IS DEDICATED TO PREPARING THE NEXT GENERATION OF INVESTORS. ITS MISSION IS TO INSPIRE YOUTH TO BE OUTSTANDING INVESTORS – INVESTORS IN COMPANIES, INVESTORS IN THEIR COMMUNITIES AND INVESTORS IN THEMSELVES.