



4TH QUARTER 2017 NEWSLETTER

YOUNG INVESTORS SOCIETY

SCHOOL CLUBS & GOLF CLUBS

A Team Effort

Last August, Andy came to me with the idea to put on the Golf Fundraiser. I said, "Great idea, but I need you'll to spearhead it". Fast forward three months to October, and he, Lee and Christine had successfully organized and carried out an amazing event that raised money and great awareness for YIS in SoCal. I received an email from someone who attended that day and said "I had a blast out at the event this afternoon. A lot of fun, good people, and impressive youngsters that came to share how YIS had impacted them personally". I just want to say amazing job, YIS SoCal team!

Dave, Bryan, Jane, and Christine also attended a total of five teacher conferences this quarter, where YIS was represented incredibly well. Dave was a featured speaker at the Jump\$tart National

Conference in Washington D.C. Ben as well filmed an interview with Stockpile's COO on Silicon Valley.

I would just like to step back and acknowledge the accomplishments and all of the time and sacrifices. Of course I wish I could have been there in all of these events, but in some ways it makes it even sweeter sometimes to see YIS thrive so well without me there physically. Our team is so talented, it makes me so grateful to see others carry the torch!

120 Schools & Counting

Young Investors Society is currently up and running in 120 high schools across the US and



ONGOING PROJECTS

MyYIS App. Who: Achint and Lutta team (iOS & Android)
Cost: \$2,000

NYC Fundraising Gala / Investment

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

Dollar-a-Day

Matches: Goal to sponsor 60 kids in FY2018 = \$10,800

Program

Development: Will pilot a CYFA test this year based on 3 books to read.

Upcoming YISLive Interview: Morgan Houzel

Asia with nearly 1,000 registered students (and many more not registered). We're essentially running about two high schools of students with only one full time employee! Just let that sink in.

New YIS Chapters continue to pop up all over the US, this quarter we added 21 new schools, including schools from Colorado, Iowa, Florida, Canada, and Ohio. Christine is working hard to support and onboard the new teachers and the planning of the state stock pitch competitions will not be easy, but it's great to see YIS spreading organically across the country.

THE BIG SCREEN

Adele Payman, the winner of the 2016 Global Stock Pitch Competition, couldn't believe it

when I sent her the picture that she was featured on the Big Screen of Nasdaq's Times Square Jumbotron. "Words cannot describe... This is a dream come true!" she wrote

back. It's just one of those unforgettable moments to see

dreams come true and these amazing kids get the recognition that they deserve. Young Investors Society is grateful to Nasdaq for the kind recognition.

Dollar-a-Day Challenge

This quarter, we launched the "Dollar-a-Day Challenge", partnering with Fidelity and Stockpile. Stockpile offered \$5 free for YIS kids to start investing and did a great video interview with us to promote the partnership. Their app, partial stock trades, and custodial accounts make it a perfect platform.

We also opened scholarship applications for kids to receive 1x1 matching funds. We look forward to announcing the winners for the sponsorships as we



received some really inspiring essays from the kids. It's great to see investing concepts we teach go from theory to practice, as kids actually starting to save and invest and learn life-long habits.

Fundraising

This quarter we raised \$23,000, of which \$6,500 came from the golf

fundraiser. We also carried out an end-of-the-year giving campaign, as well we submitted two additional grants, including one for the Adobe Foundation.

We're looking forward to our first Gala / Investment Symposium event in New York City on May 3, the evening before the Stock Pitch Finals. BNY Melon has donated their large atrium for us to use and it'll be a great event to build awareness, raise money and have a culmination event to highlight the YIS kids achievements during the year.

With an East Coast and West Coast fundraising events coming together, we envision how this will be a great structure going forward, with one major event on each coast, each year. We'll need the help from our board members and other volunteers to put on these events, but we see this as a sustainable funding base for YIS going forward.

Board Members

Last quarter we welcomed Kent Elwell as a new board member. This quarter we are happy to welcome Steve Barrus as a new board member, as we continue to build a world-class board at YIS.

Steve Barrus Steve has been involved with YIS as a past judge, donor and supporter of the SoCal Golf Fundraiser. He is a successful

Financial Advisor at Fidelity in Southern California, and just a tremendous person.

Steve currently works at Fidelity Investments as a Vice President Financial Consultant. As a financial consultant, Steve assists individuals and families with their Wealth Planning needs to ensure their financial stability up to and throughout their retirement. He began his career with Merrill Lynch in 2009.

He writes "I was introduced to to YIS when I was asked to volunteer as a judge at the annual stock pitch competition, ever since I have been all in. YIS gave me the opportunity to combine my passion to help young adults feel confident and

empowered in life with my passion around the markets and helping my clients find financial freedom. I am grateful to offer my talents to such an amazing organization."

We also announce that Derek

Westra will step down as a board member, after a year of service on the Marketing Committee. We thank him for his time and his

wonderful contribution.

Eyes on the Prize

We're in the middle of the most crucial year yet for YIS. We're looking ahead to April and May when we'll have the State Competitions, the Investment Symposium / Fundraiser event and the Global Stock Pitch Competition. There is a lot to do and a lot of new schools to welcome and educate into the

YIS program, but it's exciting to see our program get bigger and make a more meaningful impact in communities around the world.

Thank you for all of your efforts. It's the best feeling in the world to see YIS thrive, even without me there physically sometimes.

Thanks for carrying the torch, team!

- James

"WORDS CANNOT DESCRIBE... THIS IS A DREAM COME TRUE"
(ADELE PAYMAN, ON SEEING HER NAME ON THE JUMBOTRON)

YOUNG INVESTOR SNAPSHOT

Name: **Kayla Seepersad**

School: **World of Money Youth Financial Education Training Institute, New York**

Online Rank: 28/809 students



MISSION: THE 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.