

## MID-YEAR UPDATE

### 1<sup>st</sup> Founding Sponsor

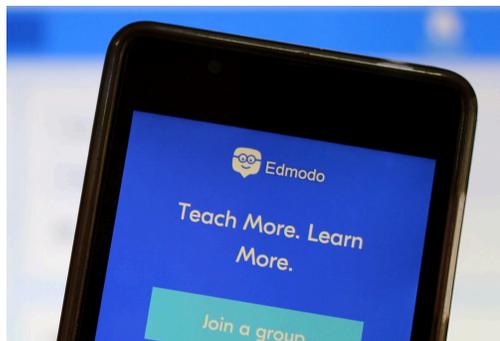
Young Investors Society is midway through our fourth year, and there are so many updates and exciting things going on, it is actually difficult to know where to begin. But we'll start here: This quarter YIS achieved a major milestone as we were able to secure our first founding corporate sponsor from Edmodo (parent company is a \$1bn company NetDragon). Edmodo is an education technology company, that is known as "the Facebook for Teachers" with over 9mn teachers across the world on its platform.

Edmodo / NetDragon committed to a two year donation of \$100k per year - \$50k in cash and \$50k in in-kind donations, including use of their IT team, use of facilities, and marketing through their platform to accelerate growth. This is a huge milestone to secure an ongoing financial sponsor! And it all came about through a contact from the

Asia Advisory Board thinking it may be a fit. In the past weeks, I have met with their Head of Education, Simon Leung (former CEO of Microsoft China) and their CFO Ben Yam many times and found them to be wonderful people whose mission and vision align well with YIS.

During one meeting, Simon asked, "How many students do you think YIS can reach in five years?" I replied, "Our five year goal is 100k students" to which he responded: "That is way too low! We'll get you to over a million, you'll see!".

It has taken a lot of building, painstakingly laying the foundation for YIS, to get the organization to the point where we could qualify for a win like this. It was a million small contributions by everyone!



## ONGOING PROJECTS

### Dollar-a-Day

**Matches:** We sponsored 25 kids for up to \$365 each, and plan to sponsor 25 more until June 2019.

### Program

#### Development:

Launched the CYIA Program in August, and test is open again in January. Personal Finance Curriculum (JV track) rollout is ongoing. We are also planning on recording more videos of lessons to provide more of an learning portal.

**IT Support:** We are aiming to build an improved YIS Mobile App.

Congrats to the YIS team, and thanks to Edmodo for their support! I expect this will lay the groundwork for additional ongoing corporate sponsorships.

### School Growth

This quarter we added 21 new schools, bringing us to 192 registered schools and just about over 2,000 active students. We added new schools from existing regions such as New York, Pennsylvania, California, Texas Hong Kong, and Malaysia this quarter, as well as added new schools in Australia (2), Germany, Hungary and South Africa.

Our school number is tracking a bit behind expectations this year as our target is 300 schools. But students love the program and engagement levels are high. It's just a matter of finding ways to scale faster and spread the word more effectively to teachers and kids. Edmodo will definitely help, and we have been surprised by the organic growth of new schools coming from all over the world, but we'll continue to push to find ways to get our life-changing program into more and more schools.

### Shark Tank Competition

This quarter, we held the YIS Shark Tank Competition. Students have the opportunity to watch ABC's Shark Tank and submit an analysis of what

companies they would recommend investing in. The winning submission is chosen by Shark Tank host and billionaire Mark Cuban himself, and the winner is given the chance to fly out and meet Mark Cuban personally. We had a great turnout of submissions and excitement from YIS kids from all over the world. The 2019 winner was Cate C. from Malaysia! Cate was selected as the winner from among the six finalists. Cate will fly out on February 22<sup>nd</sup> to Dallas. We thank Mark Cuban for his gracious efforts in continuing to give his time and support to building up YIS students with this once in a lifetime opportunity.

### Dollar-a-Day Winners

This quarter, the first batch of the Dollar-a-Day "Free Money Match" grants were announced in December, and 25 students were granted a match of up to \$365 to save and invest during 2019. We had winners from Malaysia, Hong Kong, California, Texas, Utah and Arizona. The essays were exceptional! I spoke

with the teacher of the winning student in Hong Kong, a girl originally from Bangladesh and she said "Mr. Fletcher, I am so happy to have received the Dollar-a-Day sponsorship. Thank you to Young Investors Society for giving me this incredible opportunity."

I'm so proud of the Dollar-a-Day program. I believe it is creating life changing habits, and will change the financial trajectory of these young kids and their families forever! I'm grateful for our donors that make these matching funds possible.

### Looking forward to Spring

It's exciting to look ahead to what will no doubt be an amazing end of the year for Young Investors Society, as we approach the Global Stock Pitch Competition. The kids have been preparing all year for this, and we expect teams from over 16 US states, and over six countries to participate. The state and regional competitions will be held during April, and the Global Stock Pitch Finals will be held on **May**



**Stargate High School YIS, Colorado**

**17<sup>th</sup> in New York City**, at the Marriott Downtown and at the Nasdaq Exchange! In addition to the big events in NYC, the Asia Advisory Board is planning a Financial Symposium event in Hong Kong for March, and the West Coast Advisory Board is planning their annual golf tournament. A lot of work and planning gets put into the each of these events, and we're grateful for Christine and the planning committees for their support.

### Fundraising

During the quarter YIS raised \$19,845. The contributions came from a successful end of the year Giving Campaign, donations from the SoCal golf fundraiser, and board member

"I AM SO HAPPY TO HAVE RECEIVED THE DOLLAR-A-DAY SPONSORSHIP. THANK YOU TO YOUNG INVESTORS SOCIETY FOR GIVING ME THIS INCREDIBLE OPPORTUNITY!"

(HUSSEIN A, STUDENT AT CARITAS TUEN MUN)

contributions. And we've set the groundwork for successful fundraising events to take place in the spring, which is where the

majority of the annual funding for YIS takes place.

### Team

There were no changes to the team during the quarter.

Looking forward, after the success of the Regional Advisory Boards, we are planning to start a Mid-West Advisory Board, and we held an exploratory meeting in December in Utah, which his region would include Utah, Texas, Ohio, Chicago, Arizona, and Colorado.

We also hired an intern during the quarter, **Lyon Hua**, who is spearheading a side project to grow YIS in Mainland China, and

potentially oversee the translation of our content into Chinese.

### Conclusion

We achieved another major milestone this quarter, securing

ongoing funding from Edmodo. I believe this has a good chance to catapult YIS to the next level and magnify the impact for good that we are able to have. It's an

exciting time, but it's also a daunting time! Through Edmodo's link to millions of teachers, there is the potential for YIS to expand to many more schools quickly, and we have to be prepared to support them. It will be challenging but I have no doubt that we're up to the task. I sincerely hope to prove Simon right about his vision of reaching a million kids in YIS!

Onward and upward!

- James

### YOUNG INVESTOR SNAPSHOT

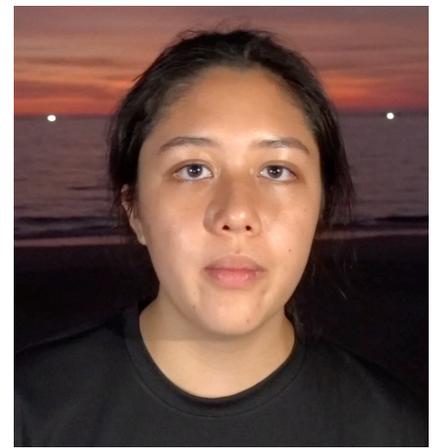
Name: **Cate C.**

School: **International School of Kuala Lumpur**

Winner of the 2019 YIS Shark Tank Competition Grand prize flyout to meet Mark Cuban.

Her Winning Submission is here:

[https://www.youtube.com/watch?v=SwxP5Ay\\_7iU](https://www.youtube.com/watch?v=SwxP5Ay_7iU)



**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.