



**YOUNG
INVESTORS
SOCIETY**

STUDENT WELCOME PACKET



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Welcome to Young Investors Society! (YIS) We are so excited to have you and your school join us on this Financial Literacy journey! The student welcome packet should help you as you



navigate your year with YIS. As always, if you have any questions, please reach out to our Chief Operating Officer, Christine Tobin at Ctobin@yis.org
Have a great year!

Greetings!

I am the founder of Young Investors Society ("YIS"). YIS is dedicated to preparing the next generation of investors. It is our goal to encourage young people and give them the tools they need to be outstanding long-term investors – investors in companies, investors in their communities and investors in themselves. YIS programs **promote financial literacy, teach personal finance skills, teach sound investment fundamentals** and **provide leadership and investment management experience** for high-school-age youth.

I started YIS because of a letter that I received from a young man named Edgar. After visiting his school in inner-city Los Angeles, and leading the class in an engaging discussion about the stock market and how investors pick companies to invest in, he wrote me the following:

"It's awesome to have someone give their time to teach us, adults don't really do that anymore, especially for teenagers like me. You may think this is a joke, but your 45-minute presentation has changed my goals for my life. It has given me something to strive for."

That letter burned in my soul. Edgar's statement that "adults don't really do that anymore" became a personal challenge for me that led me to start YIS.

Why does YIS exist? Because we believe financial education in the United States and abroad is inadequate at best. It does not begin to prepare students to manage their personal finances, let alone make responsible investment decisions in adulthood. **According to JumpStart, two-thirds of U.S. high-school students fail a basic financial literacy test.**¹

YIS wants to change that. We offer a multi-pronged approach which includes school-sponsored investment clubs; beginning and advanced courses that teach personal finance & investment basics; annual stock pitch competitions; and our very popular Dollar-a-Day Challenge, as well as our CYIA® Designation. Our curriculum is written by some of the brightest minds in the industry, and then packaged into engaging lesson plans and video content. We make the process **turn-key for teachers**, even those with little or no investment background. Simply put, we believe there is no other investment program out there as hands-on and as impactful to kids as YIS. We help kids **learn**, then **invest**, and then **inspire** others to do the same.

I thank you in advance and I look forward to working with you as we invest in the future generation!

¹ NFEC, National Financial Literacy Test Results, February 2014.

With best regards,



James Fletcher, CFA

Young Investors Society is a 501(3)(c) non-profit organization, which was founded by James Fletcher, CFA, portfolio manager at APG Asset Management. It is backed by Board Members with professional experience at prestigious academic institutions and leading asset management firms, including Harvard, Pepperdine University, the CFA Institute, Fidelity, Google, and Bank of America Merrill Lynch.

YIS Student Experience

School Sponsored Clubs: Students will learn to create life-changing habits to save and invest for the future in a fun team environment supported by local teachers on campus. Each local chapter will learn the fundamentals of personal finance and progress through the program to learn the more advanced concepts of saving and investing. Students will compete with other YIS students using the MyYIS Portfolio, gain leadership experience and learn many life lessons (e.g. hard work, patience, teamwork, etc.) They will also have an opportunity to participate in all other YIS programs.

YIS Global Club: Young Investors Society will launch the YIS Global Online Club for new YIS students and for students who do not have an established YIS club that meets regularly. The YIS Global Online club provides alternative ways for students to learn and access YIS course concepts, interactive Prezi presentations, videos, and lessons taught by our YIS Student Advisory Board Members and overseen by YIS Chief Operating Officer, Christine Tobin. Discussion forums and chat options will give students the unique chance to discover the viewpoints of each of their classmates as well as the opportunity to share their own thoughts and ideas.

The YIS Global weekly online club will meet via Zoom Video (up to 300 students) and streamed LIVE on YouTube.

We plan to launch our YIS Global Club for U.S. & Asia in early September 2020.

YIS is designed to be turn-key and can adapt to your needs. Each lesson plan can be used with or without technology in the classroom (access to computers and the internet is preferred, but not required). In addition, chapters may choose to meet more or less frequently and can even meet online.

If you are looking for some structure to help you get started, here are some “best practices” that many of our schools have found helpful.

BEST PRACTICES

- Typically, YIS is structured as an after-school club.
- The club meets weekly (usually 45-minutes)

- Majority of the clubs have a Club President, Vice President, Secretary, etc.
- In many cases, the teacher presents the material covered in the lesson plan during the meeting. However, the club should be student-led as much as possible, so one or more students may present some or all of the material covered in the lesson plan, present an idea of the week presentation or lead an activity.
- Each meeting should have pre- and post-meeting assignments designed to help the students prepare for the upcoming lesson or reinforce learning.
 - Pre-meeting assignments are typically reading an article or watching a video. They can also be preparing an idea of the week presentation related to the upcoming lesson or about a current market topic (e.g., something company specific).
 - Post-meeting assignments are typically activities, readings, and/or quizzes that reinforce the concepts taught in the lessons and tie the concept to the Stock Pitch Competition.
- Club meetings are usually 45-minutes long but that time may vary depending on the school. The suggested club meeting agenda is:
 - Idea of the Week (5 minutes):
 - Have 1-2 students quickly present on a topic currently affecting the market (e.g., Apple announces a change in its long-term strategy and what the student thinks that means for the company).
 - Review Pre-Meeting Assignments (5 minutes)
 - Lesson (20 minutes)
 - Learning Activity (15 minutes)
 - Wrap Up

Lesson Plans

Young Investors Society has created a curriculum written by some of the top investors in the world, complete with 30+ turn-key lesson plans that teach many fundamental investing concepts including accounting, finance, ethics, economics, psychology, mathematics, business strategy and entrepreneurship. YIS lessons are comprised of online interactive activities, engaging presentations and curriculum support videos along with peer-led activities focused on financial literacy lessons that emphasize the importance of saving and investing for the future. YIS has courses and lessons available for students to self-select into depending on their comfort and skill level.

Money Skillz Bootcamp: Intro to Personal Finance

Young Investors Society has launched the Money Skillz Bootcamp for students in 7th-12th grade! This beginner 10-hour course comprised of The Seven Golden Rules of Investing and the 5 Steps to Financial Freedom will give students a foundation in personal finance, saving, and investing that will lay the foundation for future YIS lessons & programs. This course can be started at any time and is structured as a student self-study course that meets all the criteria for current distance learning methods.

Students will learn the fundamentals of earning money, saving, budgeting, banking, investing, career exploration and so much more!

Advanced Investing: 7 Units

The Advanced Investing Units are designed for YIS students who have basic knowledge of finances and wants to learn investment principles. The Advanced Investing Curriculum is our main program and most students will start with the Money Skillz Bootcamp and then continue on to our 7 units of courses & lessons.

The Advanced Investing Curriculum Series includes lessons in the Stock Market, Investment Principles, Stock Value, Identifying a Good Business, The Language of Finance, Investment Thesis, and Intrinsic Value. This series is comprised of 24 lessons that prepares students for the Stock Pitch Competition held in April each year. The Stock Pitch Competition emphasizes an in-depth company overview and valuation based on P/E Ratios.

Stock Pitch participants that win their State event will be invited to compete in the Regional Event and those winners will be invited to compete in the Global Stock Pitch Competition held virtually.

Each lesson plan contains the following resources:

- PDF lesson plan including:
 - Mapping to Common Core standards
 - Objectives
 - Suggested resources (websites, books, articles)
 - Handouts with practice problems and answer keys
 - Prezi presentation
 - Videos and links to other resources (as necessary) on YIS website and YIS YouTube Channel: <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ>

LESSON PLAN OUTLINE

MONEY SKILLZ BOOTCAMP: Intro to Personal Finance–9 weeks

- **5 STEPS TO FINANCIAL FREEDOM**

- Lesson 1 – Earning Money
- Lesson 2 – Saving Money
- Lesson 3 – Developing a Financial Plan
- Lesson 4 – Investing and The Power of Compounding
- Lesson 5 – Avoiding Common Mistakes

- **THE SEVEN GOLDEN RULES OF INVESTING**

- Lesson 1 – Who Are Investors? Why Invest?
- Lesson 2 – What Does it Mean to Invest in the Stock Market?
- Lesson 3 – Beating the Market
- Lesson 4 – The Seven Golden Rules of Investing

ADVANCED INVESTING : 7 Units–24 weeks

- **UNIT 1 - THE SEVEN GOLDEN RULES OF INVESTING**

- Lesson 1 – Who Are Investors? Why Invest?
- Lesson 2 – What Does it Mean to Invest in the Stock Market?
- Lesson 3 – Beating the Market
- Lesson 4 – The Seven Golden Rules of Investing

- **UNIT 2 - THE VALUE OF A STOCK**

- Lesson 1 – Fluctuations & Market Caps
- Lesson 2 – What is the Value of a Business
- Lesson 3 – Applying the P/E Ratio

- **UNIT 3 - WHAT MAKES A GOOD BUSINESS**

- Lesson 1 – How Do I Know if a Company is a Good Business?
- Lesson 2 – Whatever Floats Your Moat
- Lesson 3 – Predicting the Future

- **UNIT 4 - FINDING STOCKS TO INVEST IN**

- Lesson 1 – Coming Up with Investment Ideas
- Lesson 2 – Using Research Reports to Evaluate Stocks

- Lesson 3 – Make a List
- **UNIT 5 - THE LANGUAGE OF FINANCE**
 - Lesson 1 – Introduction to the Language of Finance
 - Lesson 2 – Why Do Companies Prepare Financial Statements?
 - Lesson 3 – The Income Statement
 - Lesson 4 – How Do I Forecast Revenues of a Company?
- **UNIT 6 - INTRINSIC VALUE**
 - Lesson 1 – Introduction to Intrinsic Value
 - Lesson 2 – Let's Buy a House
 - Lesson 3 – Determining the Intrinsic Value of a Company
 - Lesson 4 – The Relative Valuation Method
- **UNIT 7 - THE INVESTMENT THESIS**
 - Lesson 1 – Introduction to Investment Thesis
 - Lesson 2 – What is an Investment Thesis?
 - Lesson 3 – Case Study

YIS CURRICULUM SUGGESTED SCHEDULE – CLUB MODEL (MEETING ONCE PER WEEK e.g. Wednesday)

Week	Date	Lesson Title
1	9/9/2020	YIS First Class Presentation/ Overview & Meet & Greet
2	9/16/2020	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 1: Who Are Investors?
3	9/23/2020	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 2: What Does It Means to Invest In the Stock Market?
4	9/30/2020	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 3: Beating the Market
5	10/7/2020	Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 4: The Seven Golden Rules of Investing
6	10/14/2020	Dollar-A-Day Introduction & Write-Up: The Value of a Stock: Unit 2: Lesson 1: Fluctuation & Market Cap
7	10/21/2020	The Value of a Stock: Unit 2: Lesson 2: What is the Value of a Business?
8	10/28/2020	The Value of a Stock: Unit 2: Lesson 3: Applying the P/E Ratio
9	11/4/2020	What Makes a Good Business?: Unit 3: Lesson 1: Whatever Floats Your Moat
10	11/11/2020	What Makes a Good Business?: Unit 3: Lesson 2: Predicting the Future
11	11/18/2020	What Makes a Good Business?: Unit 3: Lesson 3: How Do I Know if a Company is a Good Business?
12	11/25/2020	THANKSGIVING BREAK
12	11/30/2020	Dollar-A-Day FREE Money Match Applications DUE
13	12/2/2020	Finding Stocks to Invest In: Unit 4: Lesson 1: Coming Up with Investment Ideas
14	12/9/2020	Finding Stocks to Invest In: Unit 4: Lesson 2: Using Research Reports to Evaluate Stocks
15	12/23/2020	WINTER BREAK
16	12/30/2020	WINTER BREAK
17	1/6/2021	Finding Stocks to Invest in: Unit 4: Lesson 3: Make a List
18	1/13/2021	Dollar-A-Day & Write-Up: Learning to Speak the Language of Finance: Unit 5: Lesson 1: Intro
19	1/20/2021	Learning to Speak the Language of Finance: Unit 5: Lesson 2: Why Do Companies Prepare Financial Statements?
20	1/27/2021	Learning to Speak the Language of Finance: Unit 5: Lesson 3: The Income Statement
21	2/3/2021	Learning to Speak the Language of Finance: Unit 5: Lesson 4: How Do I Forecast Revenues of a Company?
22	2/10/2021	Intrinsic Value: Unit 6: Lesson 1: Introduction to Intrinsic Value
23	2/17/2021	Intrinsic Value: Unit 6: Lesson 2: Let's Buy a House
24	2/24/2021	Intrinsic Value: Unit 6: Lesson 3: Determining the Intrinsic Value of a Company
25	2/28/2021	Dollar-A-Day FREE Money Match Applications DUE
25	3/3/2021	Intrinsic Value: Unit 6: Lesson 4: The Relative Valuation Method
26	3/10/2021	The Investment Thesis: Unit 7: Lesson 1: Introduction to Investment Thesis
27	3/17/2021	The Investment Thesis: Unit 7: Lesson 2: What is an Investment Thesis?

28	3/24/2021	The Investment Thesis: Unit 7: Lesson 3: Case Study
29	3/31/2021	Stock Pitch Prep Night
29	4/5/2021	Stock Pitch Reports & Presentations DUE
30	4/7/2021	State Stock Pitch Competitions
31	4/14/2021	State Stock Pitch Competitions
32	4/21/2021	State Stock Pitch Competitions
33	4/28/2021	State Stock Pitch Competitions
34	5/5/2021	State Stock Pitch Competitions
35	5/6/2021	Midwest Regional Stock Pitch Competition
36	5/13/2021	East Coast Regional Stock Pitch Competition
37	5/20/2021	West Coast Regional Stock Pitch Competition
38	5/21/2021	Asia Regional Stock Pitch Competition
39	5/27/2021	Global Stock Pitch Competition

Young Investors Society Programs

Young Investors Society has a variety of enrichment programs and contests outside of the courses and lessons for your students to enter. These programs are designed to enrich our curriculum and give students the chance to put their investment knowledge and skills to use.

Start Investing NOW Giveaway



Young Investors Society

Start Investing Now

HOW IT WORKS

The Start Investing NOW program is designed to encourage students to open a savings and/or brokerage account and start saving and investing their own money (Custodial account if under 18 years old). Students can open an account at ANY financial institution of their choice. Once they open an account, they are eligible to enter the Start Investing NOW Giveaway.

HOW TO ENTER

Students will enter the Start Investing NOW Giveaway by completing the info at:

<https://yis.org/programs/start-investing-now/>

Students are required to be registered YIS members and must check the certification box certifying that they have opened a saving and/or brokerage account. They pledge to start investing their own money and to start to save and invest for their future. Each student is allowed to enter the drawing **once** during the school year for every account they have.

WHEN DO DRAWING OCCUR?

Drawings will be conducted monthly at the end of each month during the school year (July 2020-June 2021).

Drawings will be conducted using a random number generator to select the winner. Winners will

be announced on social media and will be notified via email. Students will reply with their mailing address and a check will be mailed to the student in the amount of \$100.00.

DRAWING RULES

Students must be registered members of YIS to enter.

No purchase necessary to enter or win. Open to all YIS students who have opened a savings and/or brokerage account. Void where prohibited by law.

Dollar-A-Day Challenge



Young Investors Society challenges every student to start saving and investing their own money into a personal brokerage account. This program allows the students to experience the power of compound interest with real money and to create great habits that will help them secure their financial future. Students can also compete for a FREE Money Match scholarship by submitting a brief essay. A limited number of YIS students (1 in 5) will receive a scholarship match for their contributions for the year. This program helps students develop the lifetime habit of saving and investing for retirement as well as to understand the value of long-term decisions.

THE MOTIVATION

The average American has only \$148,000 saved by the time they reach age 65. Members of the Young Investors Society, however, are not average. YIS students can accumulate way more than that in their lifetime.

Say you cut back on one can of soda per day (\$1 a can), resulting in a savings of \$365 by the end of the year per year. By saving this amount each year and investing it at 11% (a bit above the 10% stock market average of the S&P 500 for the past century), this is worth \$1.4 million by the time you retire (age 70) That's pretty impressive! But it gets better... YIS has an amazing group of donors that invest in students willing to take action.

FREE Money Match Scholarship



Students who take the Dollar-a-Day Challenge will be eligible for a FREE Money Match Scholarship. That means getting an extra \$365 in your account each year that you are sponsored. Let's assume you're sponsored for four years. That \$1.4 million has increased to \$2.1 million. But let's assume you keep saving for another ten years. Your \$2.1 million continues to compound until you're 80 and it reaches \$5.9 million.

By the time you're 90, you've got \$18.2 million! That's the magic of starting early and the power of compounding! And better... Now it gets even more interesting. When you're 80 you keep \$1 million for yourself and take the remaining \$4.9 million dollars and sponsor the next generation of "Dollar-a-Day" young investors. You will be able to sponsor 3,356 students for four years each and by the time they turn 90 that number has accumulated to \$61,146,002,259. (That's billion).

That's the magic of starting early and the power of compounding! Summary: One less can of soda per day, invested well, over two generations = \$61 billion dollars. About the size of the economy of Bolivia and Jamaica combined.

HOW IT WORKS

YIS has partnered with Stockpile and Fidelity to allow students to start investing. Students who are 18 years old can start their own accounts; students who are younger than 18 will need to set up custodial accounts with their parent or guardian. Visit <https://www.stockpile.com/> and <https://www.fidelity.com/> to determine which brokerage is right for you.

100 YIS Dollar-A-Day participants will receive a FREE Money Match Scholarship that matches their contributions up to \$365 (Fall) or \$182.50 (Spring).

Students need to write a one-page essay on a provided topic and apply for the FREE Money Match Scholarship using the application on our website: <https://yis.org/programs/the-dollar-a-day-challenge/match/>

Applications will be accepted twice a year: November 30, 2020 for Fall and Feb. 28, 2021 for Spring.

Applicants will be notified via email if they are selected for the FREE Money Match Scholarship and will need to submit copies of bank statements for verification before funds are distributed in June 2021.

Stock Pitch Competition



This competition is the culmination of investment skills gained during the year and provides students hands-on mentoring in financial analysis. Students (individually or in teams of two) create a “best stock idea” and analyze a publicly traded company. Each student/team writes a report on their chosen company with a “Buy” or “Sell” recommendation and then defends their analysis in a written report and brief to a panel of university professors and industry professionals. The winners advance through state, regional and a global competition, where one team emerges as the Global Stock Pitch Champion. The competition rewards long-term, original business analysis, and presentation skills. You can watch the 2020 Global Stock Pitch winning presentation here: <https://www.youtube.com/watch?v=D175EYIIXsk&t=6s>

HOW IT WORKS

YIS has created a contingency plan for the 2020-2021 School Year. This plan takes into consideration guidelines set by the World Health Organization, CDC, and Department of Health & Human Services. Our plan is as follows for the YIS State Stock Pitch Competitions & Global Stock Pitch Competition.

All of our events will be held virtually using our Zoom Video platform and submitted YouTube videos of student’s presentations. State events will be conducted via Zoom Video (10 or fewer students) or via Youtube Video entries (11 or more students). State winners will be selected and will compete regionally in online events for the East Coast, Midwest, West Coast, & Asia.

Regional winners will be invited to participate in the Global Stock Pitch Competition (Zoom Video) event where students will be awarded 1st-3rd place prizes. We hope to minimize the disruption in student’s lives by giving them a chance to still participate in our stock pitch events online.

HOW TO REGISTER

Stock Pitch Registration opens **February 15, 2021** on the MYYIS Portal.

Log into the MyYIS Portal, Click on the calendar on the top of the page. Search for the competition in your state and click on participate. Each team member must register individually, no more than 2 members per team. Be sure to click on the event to see any special instructions.

Registration closes for all competitions on March 31, 2021.

Important Dates

- Deadline to register for State Stock Pitch Competitions: Midnight (PST) on March 8, 2021 (to ensure proper t-shirt size)
- Deadline to submit Stock Pitch Report & Presentation Report: Midnight (PST) on April 5, 2021
- State Competitions: March 29th-April 30, 2021

Regional Stock Pitch Competitions: Zoom Video

- Midwest: May 6, 2021
- East Coast: May 13, 2021
- West Coast: May 20, 2021
- Asia: May 21, 2021

Global Stock Pitch Competition

- May 27, 2021 (Zoom Video)

STOCK PITCH REPORT GUIDELINES

Each student or team of 2 is required to submit **BOTH** a written stock pitch report and Stock Pitch Presentation.

The written report must:

- Be no longer than 10 pages; although it may include an appendix of infinite length
- Include the following information:
 - Student Name, School, State/Region, Email Address
 - Company name
 - Exchange or Ticker symbol
 - Sector or Industry
 - Recommendation (Buy/Sell/Hold)
 - Current price (as of submission date)
 - Target price (% increase/decrease)
- Contain only publicly available information
- Be the original work of the student(s)
- Be prepared from the perspective of an independent research analyst
- Include, without limitation, the following sections:

- Business Description
- Industry Overview and Competitive Positioning
- Investment Summary
- Valuation
- Financial Analysis
- Investment Risks

STOCK PITCH PRESENTATION GUIDELINES

The Stock Pitch Presentation must:

- Be a summary of the Stock Pitch Report done on PowerPoint or Google Slides.
- Include the following information on the slides:
 - Student Name, School, State/Region, Email Address
 - Company name
 - Exchange or Ticker symbol
 - Sector or Industry
 - Recommendation (Buy/Sell/Hold)
 - Current price (as of submission date)
 - Target price (% increase/decrease)
- Contain only publicly available information
- Be the original work of the student(s)
- Be prepared from the perspective of an independent research analyst
- Include, without limitation, the following sections:
 - Business Description
 - Industry Overview and Competitive Positioning
 - Investment Summary
 - Valuation
 - Financial Analysis
 - Investment Risks

SUBMISSION GUIDELINES

Stock Pitch Reports can be saved as a PDF and may be submitted via email to: Ctobin@yis.org by Midnight (PST) on **April 5, 2021** for the 2020-2021 Stock Pitch Competitions.

Stock Pitch Presentations can be saved as PowerPoint or PDF and may be submitted via email to: Ctobin@yis.org by Midnight (PST) on **April 5, 2021** for the 2020-2021 Stock Pitch Competitions.

Both Stock Pitch Report & Stock Pitch Presentations must be submitted prior to the deadline to be eligible to compete in the Stock Pitch Competitions.

HOW TO GET HELP

This section of the website is full of helpful things designed to give you an edge:

<https://yis.org/programs/stock-pitch-competition/>

There are videos, templates, report submission guidelines, and more to help create a winning report and presentation. Be sure to explore the website and our YouTube channel for previous winning stock pitches and help with your stock pitch report.

Stock Pitch Prep Night

YIS will host Stock Pitch Prep Nights on Zoom video where Regional Advisory Board Members and previous stock pitch judges will give advice on stock pitches, presentation tips, and answer any questions related to the event and scoring. (Meeting dates will be announced)

Certified Young Investment Analyst (CYIA®) Designation



The highest honor within the Young Investors Society is to be awarded a Certified Young Investment Analyst (CYIA®) Designation.

The CYIA® Designation represents a tremendous achievement. Less than 10% of those students that enter YIS end up achieving the CYIA® Designation. It is widely respected by Universities and future employers. High school students that are able to earn the CYIA® have proven that they are the best-of-the-best. They have mastered the fundamentals of stock analysis, studied for and passed a rigorous examination, that covers advanced financial concepts, maintain a stellar GPA, and are uniquely prepared to major in business, finance or accounting.

CYIA® QUALIFICATIONS

- Be an active member of Young Investors Society
- Pass the 60 question, multiple choice, CYIA exam (50% pass rate).
- The exam will be available quarterly **August 1st-August 30th, 2020**
January 1st-January 31, 2020 & April 1-30th, 2021
- Participate in a YIS State or Regional Stock Pitch Competition.
- Participate in the Dollar-A-Day Challenge.
- High School Teacher or (YIS Advisor) Letter of Recommendation.
- Participate in a Community Service Project – 10 hrs.
- Minimum GPA of 3.0 or equivalent.
- Conduct a final interview with a YIS Board Member.

Exam is based on the following books:

The YIS Stock Investing 101 eBook

<http://yis.org/wp-content/uploads/2016/10/Stock-Investing-101-eBook.pdf>

The Essays of Warren Buffett 3rd Edition by Lawrence Cunningham

<https://www.amazon.com/The-Essays-Warren-Buffett-Corporate/dp/1611634091>

Students can download the CYIA® Application on our website and view the Exam schedule and link to test (during testing period) here: <https://yis.org/learn/programs/local-chapters/>

CFA Institute Investment Foundations® Program



Young Investors Society has partnered with the CFA Institute to bring the CFA Investment Foundations® program to our YIS students.

The CFA Institute Investment Foundations Program covers the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry.

This 80-hour online learning experience is designed for anyone who wants to enter or advance within the investment management industry, including IT, operations, accounting, administration, and marketing.

Candidates who successfully pass the online exam earn the CFA Institute Investment Foundations Certificate, demonstrating a mastery of core foundational principles of the investment profession.

CFA Investment Foundations Program will be FREE to applicants who apply between August 1st-August 31st, 2020. After these dates, CFA Institute will charge a nominal course fee. *(If you are unable to pay the fee, please let YIS know as we may have scholarships available)*

Application and course syllabus are available on our website:

<https://yis.org/programs/cfa-investment-foundations-program/>

Applications can be submitted to Ctobin@yis.org

Student MyYIS Portfolio

STUDENT MY-YIS PORTFOLIO OVERVIEW

The MyYIS Portfolio is an exciting, interactive way for students to practice the principles they are learning in the courses in a competitive, simulated environment. Students Log-in to the MyYIS portal to access their portfolio.

- Students need two things to build their MyYIS Portfolio: Net Worth and Credits.
 - “Net Worth” is the money (i.e., sorry not real money... MyYIS \$’s) that students earn as they complete the lesson plans and quizzes associated with the lesson plans.
 - Credits are earned by completing the courses and passing the quizzes. Each stock submission uses one credit.
- Once students have Credits and Net Worth, they can invest it in companies of their choice. To do that, they must:
 - Write a quick stock pitch on that company and publish it on the YIS website before they can “buy” the stock.
 - The stock pitch is 100 characters or less and they should state the reason for choosing the company.
 - Choose how much of their Net Worth they want to put into that company.
 - They cannot “Sell” until they reach a certain level, so have them choose wisely.
- They will watch their net worth change as the market changes and compete against the broad YIS community. The Leaderboard section of the MyYIS portal shows their rank vs. the YIS community.
- They can check out the Stock Portfolio section of the MyYIS portal to see what others in the YIS community have posted. They can give feedback to their fellow members by giving their pitch a thumbs up or down.
- Bonus: The stock pick that receives the most thumbs up votes at the end of each month will receive an extra \$1 million net worth dollars.

STUDENT DASHBOARD

The Student Dashboard is an overview of the student’s Level, Net Worth, and Rank. It also shows the student which Course they are on and what Levels have been completed. Students can continue their Lessons/Courses from here.

STOCK PITCH PORTFOLIO

Students earn Stock Pitch Credits by completing all the lessons in a Course and Quizzes. Stock Pitch Credits are used to “pitch” a stock in the Stock Portfolio. Each stock pitch uses one credit. Students can check their available stock credits by clicking on the Stock Portfolio Tab/Submit A Stock. Once students have Credits and Net Worth, they can invest in the companies of their choice. To do that, they must:

- Write a quick stock pitch on that company and publish it on the Stock Portfolio/Submit A Stock page before they can “buy” the stock.
- The stock pitch is 100 characters or less and they should state the reason for choosing the company.
- Choose how much of their Net Worth they want to put into that company.
- They cannot “Sell” until they reach a certain level, so have them choose wisely.
- Bonus: The stock pick that receives the most thumbs up votes at the end of each month will receive an extra \$1 million net worth dollars.

STUDENT LEADERBOARD

The leaderboard shows the ranking of all YIS students who have completed courses and lessons. This page shows their Level, Net Worth, Rank, and Last Stock Pitched on the Mock Portfolio.

COURSES

The courses page is where students can go to complete lessons, view Prezi presentations, and take quizzes. All courses are listed here and lessons can be downloaded from here.

QUIZZES

Each lesson has a brief quiz at the end that the students must pass in order to earn MyYIS money towards their Net Worth. The money earned depends on how many questions are answered correctly.

NEWS & EVENTS

YIS blog posts and articles pertaining to the finance world will be posted here for students to read, review, or use as topics for the Idea of the Week. Students can submit their own articles to be posted for all by submitting to Ctobin@yis.org

CALENDAR

All Stock Pitch Competitions will be posted on the Calendar. Each State event will have their own date, event description and deadline to register. Students will find their State Stock Pitch Competition and click to register for the event. They will be able to register for the event and select their t-shirt size.

Student Resources

We would like to thank you in advance for starting or joining or starting a YIS Chapter at your school. We hope to give you as many resources as you need for your club to succeed this year and in the years to come.

VIDEOS FOR STUDENTS

We have several introductory videos on our YouTube Channel. They cover each aspect of YIS, from the Stock Pitch Competition to the Dollar-A-Day Challenge to a mock classroom experience. Please watch these videos at your convenience to help prepare you for YIS at your school. YIS Videos can be found here:

<https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

FOLLOW US ON SOCIAL MEDIA



Young Investors Society uses Facebook, Instagram, Twitter, LinkedIn, and YouTube to keep our teachers and students updated on new content, updates, activities, and contests. Please follow our social channels so you can stay updated with YIS!

Facebook: <https://www.facebook.com/yisorg/>

Instagram: <https://www.instagram.com/yisorg/>

Twitter: <https://twitter.com/YISORGANIZATION>

LinkedIn: <https://www.linkedin.com/company/young-investors-society/>

YouTube: <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

ADDITIONAL RESOURCES

- [YIS Website](#): Curriculum Courses, Lessons, & Programs
- [YIS YouTube Channel](#): Curriculum Videos, Interviews, Stock Pitches, etc
- [YIS Merchandise](#): YIS T-shirts, Hoodies, and other branded items
- [YIS Stock Investing 101 E-Book](#): Student & Teacher Handbook for Courses & Lessons

- [Finscreener.com](#): great online stock screener, earnings reports, and summaries for stock pitch reports.
- [Morningstar.com](#): best site for company research including company ratios and financials
- [Google Screener](#): most robust free screening tool, allows you to add many different criteria.
- [Seekingalpha](#): online portal for company stock reports and market news
- [Motleyfool.com](#): great online portal for news, market perspective and stock ideas.
- [Zacks.com](#): for company research including ratios and screens
- [Gurufocus](#): for company analysis
- [Wallstreetsurvivor](#): for basic stock concepts and leagues to run mock portfolios.
- [Yahoo Finance](#): for stock charts and basic company information
- [Investopedia](#): the “Wikipedia” of Investing, great online glossary of terms
- [Stockcharts](#): for tracking stock market performance and comparison between stocks.

Other Resources:

- [ClayTrader](#): a great Podcast resource featuring a Trading 101 series, which helps educate those that want to learn about the stock market and how it works, along with other series including Trading Guides, Trading Tools, Case Studies, and Chart Analysis.
- [Annuity.org](#): a great resource for basic financial literacy topics such as budgeting, credit, planning for retirement and so much more.

Books:

- *Essays of Warren Buffett*: by Warren E. Buffett and Lawrence A. Cunningham
- *The Little Book That Beat the Market*: by Joel Greenblatt
- *The Early Investor*: by Michael Zisa

YIS MERCHANDISE

YIS offers a variety of t-shirts, hoodies, bags, mugs, and accessories available on the YIS Merchandise Store. 100% of all merchandise proceeds go to fund YIS programs. Get your YIS club merchandise here:

<https://shop.spreadshirt.com/young-investors-society>



Young Investors Society LOGO - Sweatshirt Cinch Bag
\$20.49



Young Investors Society LOGO - Coffee/Tea Mug
\$14.99



Young Investors Society LOGO - Tote Bag
\$18.49



FREQUENTLY ASKED QUESTIONS

We are relying on you to help us know what additional resources you need to help YIS and your club to succeed. Please email us any questions and feedback at Contact@yis.org so we can improve YIS.

As we receive questions, we will be adding to our FAQs, which we will share with you.

Q: How do I start my own YIS Club?

A: *YIS has all the resources you need to start your own high school club. Please visit our website at: <https://yis.org/join-young-investors-society/start-your-own-chapter/> You will find information on how to register, start your club, and our First Club Meeting Presentation and Recruitment Flyer.*

Q: Do I need find a Business/Economics Teacher to teach YIS?

A: *No, many of our teachers have no financial background. Many teach other subjects such as English, Math, Science, etc. YIS is structured as a turn-key platform that anyone can teach. Most of our clubs are student-led and the teacher is there for support.*

Q: How many students should I have in the club?

A: *YIS would like to see at least 10 students per club. We have found that at least 10 students per club allows for team activities and provides a social network for the students. It also allows the schools to have their own Regional Stock Pitch Competition.*

Q: Does YIS take donations?

A: *Yes, YIS is a 501(C)3 nonprofit organization and relies on corporate sponsors and individual donations to be able to provide our financial literacy programs. All donations are tax deductible. Visit our donation page here: <https://yis.org/donate/>*

Q: I have a mix of brand new Freshman and seasoned Upper Classmen, how should I structure the club?

A: *YIS Suggests having everyone meet together at the beginning of the meeting to go over Idea of the Week Presentations, pre-assignments, etc. Students can then break into groups for the lessons and work on content in their groups. One group can work on the Money Skillz Bootcamp while the other starts on the Units lessons.*

Q: How do we host our own Stock Pitch Competition?

A: *Many schools host their own State Stock Pitch Competition. The process is simple, Email our C.O.O at Ctobin@yis.org and she will help arrange reserving a venue (School MPR, Auditorium or online). You will need at least 4 teams of students to host a State Stock Pitch Competition. Your event will be added to our website and all event items will be mailed to you prior to the event.*

Q: How many kids can apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships?

A: *We would love to see ALL YIS students apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships. 100 students will be selected to receive the FREE Money Match Scholarships this year.*

Q: Where do I get updates on upcoming events and submission deadlines?

A: *YIS will email you regularly about our upcoming program, events, and deadlines. You should also receive our Monthly Newsletter which contains all important events and deadlines for submission. You can also visit our website at www.yis.org and follow us on our social media channels for important news and events.*



QUESTIONS

If you have any questions about YIS curriculum, lessons, or just need to chat with someone about your YIS club, please contact our Chief Operating Officer, Christine Tobin at Ctobin@yis.org (805) 479-5292.