

INVESTORS CAN CHANGE THE WORLD!

A Message from Victoria

I recently received a message from a young woman named Victoria. She explained how she had just been offered her dream internship at Brown Brothers Harriman and she wanted to thank me. I racked my brain, but I couldn't remember meeting her before! She explained that she wanted to thank me because her classmate at Drexel University, Faizan Muhammad, had gotten her excited about investing and finance, mentored her, and now she had just landed a promising internship. She was writing to thank me for YIS and Faizan!

Many of us remember Faizan's incredible story: He was a young man that grew up in a poor area

in Pakistan. He discovered Young Investors Society online, went through the lessons and won the 2018 Global Stock Pitch Competition in NYC. He was then admitted to Drexel University and has landed impressive internships since. YIS completely changed his life. And now, it is changing the lives of those around him.

It is because of stories like this, that we are excited to unveil a new Vision Statement for YIS, to capture what we believe is our "just cause" and our WHY of why we exist. I find it simple, yet inspiring and powerful.

Our Vision

Investors can change the world!

We believe that when youth are empowered by financial literacy, they can become outstanding investors in companies, societies and themselves, thus achieving financial independence and breaking the cycle of generational poverty.



Pictured: Faizan M.

ONGOING PROJECTS

Dollar-a-Day Matches:

We sponsored 100 kids during the 2019-2020 school year, and target to sponsor 100 in 2020-2021, along with 12 "Start Investing Now" sponsorships.

Program Development:

- Continuous refinements to the website and MyYIS portal.
- Creating ESG Module.
- Translating Lessons into Chinese and Spanish.
- Creating Advanced Courses.

Upcoming Events

- 6 Feb 2021: Shark Tank Contest Interview
- 19 Feb 2021: Global Investment Symposium
- 27 May 2021: Global Stock Pitch Competition

We also unveil an updated Mission Statement. The mission statement is more geared toward what our program offers and we feel it will be a more appealing description for grants and donors.

YIS Mission Statement:

Young Investors Society provides quality financial literacy education and programs to students from all backgrounds and socio-economic levels. We aim to teach finance and investing skills that will last a lifetime and empower students to take control of their financial future.

Combining the two, we have the WHY and WHERE we are going (Vision) and WHAT we will do (Mission Statement). Thanks to the Mission Statement Task Force for all of their hard work this quarter in putting these together.

Another Hundred Schools

Last quarter we added 110 new schools, which was a record for us, but I thought it may be temporary because of the back-to-school push. But this quarter we added another **105 schools** and 624 students, bringing our total to **711 schools** at the end of December. It's amazing to think that we started the first year with six schools, and now we are adding on average about 6-10

schools per week, and mostly through word of mouth! We are well on our way to hit our goal of 800 schools by June.

Our Online Global Club also continues to be a successful model with phenomenal student teachers and guest speakers each week.

Shark Tank Contest

We are excited to announce that Shark Tank star, **Daymond John**, has agreed to be our promotional contest winner for our YIS Shark Tank contest this year. The winning student / team will win a chance for a personal 1x1 interview with Daymond John through Zoom on February 8th. The winners will be announced in coming weeks, and there has been outstanding participation this year from the students. I have seen some of the videos, and they are really excellent.



Pictured: Daymond John

Investment Symposiums

One advantage of moving more learning to Zoom is that we

are able to bring together the YIS Community more easily.

By popular demand, we are excited to launch free Investment Symposiums to the YIS Students taught by Industry leaders. The **Global Investment Symposium** will be held on 19 February, and will include incredible instructors, **Jeff Garcia**, Partner at Capital Group teaching Fundamental Investing, **Greg Shell**, Managing Director at Bain Capital teaching Impact Investing, **Grace Reyes**, CEO of TIDE (The Investment Diversity Exchange) teaching Networking in Asset Management, and **David Lee**, Professor at HKU, teaching FinTech / AI. Pretty awesome lineup the kids can look forward to!

Additionally, we will hold a **Hong Kong Investment Symposium** on 24 February, and a first ever **India Investment Symposium** on 3 March, all with a stellar lineup of speakers. We're grateful that technology allows us to better bridge the gap between kids and financial professionals.

Fundraising

I am profoundly grateful to so many of you for participating in the "25 Days of Giving Campaign" that we held in December. We successfully met our goal of \$50k in donations during the Campaign, which was

matched by another \$25k from board member, **Claudio Brocado**. This led to a total \$84k raised during the quarter. Even more impressive is that 100% of board members participated in the Campaign, which is a key figure that goes into the annual audit.

I am so grateful for the incredible support from all of the YIS volunteers. 100% of the proceeds will go towards the Access Initiative (previously called the At-Risk Initiative) to focus on under-resourced schools and communities.

IFEC 2020 Champion Award

In December, we found out that Young Investors Society was awarded the Hong Kong Investors and Financial Education Council's (IFEC) **2020 Financial Education Champion Award** for our efforts in providing financial literacy education in Hong Kong.

The growth of YIS schools in Hong Kong and the successful Investment Symposium we put on in January 2020 were major

factors to their decision. I want to thank the HK Advisory Board, whose hard work brought about this recognition.



James holding the 2020 IFEC Award

Team Updates

This quarter, we continued to employ **Tim Zhang** on his project based work for the new ESG / Impact Investing Module, as well as the translation of Stock Investing 101 into Chinese. There were no personnel changes.

On the board level, we are excited to announce that **Bryan Jack** will rotate up to the VP Position on the Executive Board, and **Lee Mackay**, after four

incredible years of service on the Exec Board will rotate back to the General Board. **Kent Elwell** has also completed his term on the board, and will retire this quarter. We are so grateful to both Lee and Kent for their service and contributions.

Conclusion

Times are not easy, these past months have really been difficult for many of us, but one of the bright spots is knowing of the great impact we continue to make for the next generation.

When I hear stories like Faizan and Victoria, and thousands more like them of lives that are being changed, when I witness how the growth of YIS accelerating, it makes me grateful for how far we've come, all of the amazing memories along the way and makes me excited for all that is yet to come.

Investors can change the world!

James

OUR VISION: INVESTORS CAN CHANGE THE WORLD!

WE BELIEVE THAT WHEN YOUTH ARE EMPOWERED BY FINANCIAL LITERACY, THEY CAN BECOME OUTSTANDING INVESTORS IN COMPANIES, SOCIETIES AND THEMSELVES, THUS ACHIEVING FINANCIAL INDEPENDENCE AND BREAKING THE CYCLE OF GENERATIONAL POVERTY.