



SEPT 2021 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

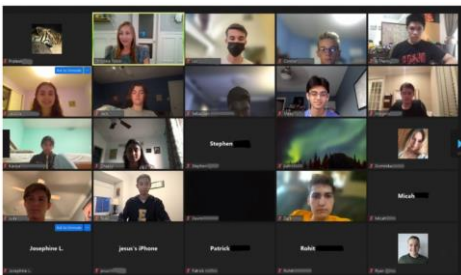
YIS REACHES 1,000 SCHOOLS!

And shows no signs of stopping...

Six years ago we started Young Investors Society with 6 pilot schools. Today, we have reached a huge milestone of serving over 1,000 schools and over 7,000 students in 43 US states and 22 countries around the world. What a dream that has turned into a reality!

With all this growth, what continues to amaze me most is the kids. Just how excited, passionate, talented, and what a force for good these next generation of kids are going to be! Reaching 1,000 schools means **1,000 times more financial literacy** being taught in schools than was ever taught before.

- It means **1,000 bridges** being built between financial professionals and kids.



2021/2022 YIS Student Advisory Board

- It means 1,000 times more **habits changed** to learn of saving and investing through the Dollar-a-Day program.
- It means **1,000 opportunities** for kids to learn leadership, presentation skills, plan for their college educations and be part of a growing global community.
- It means **1,000 times more lives forever changed.**

At the General Board onsite in July in Park City, Utah, we created a fun, short video to say a few more highlights of what reaching 1,000 schools means to each of us. Watch it [here!](#)

Thanks to each and every one of you who have played a pivotal role to bring YIS to where it is today!

Back to School

This quarter, we added **75 new schools** and 495 new registered students to reach a total of 1,062 schools. What was really exciting is we set an all-time record of 489 lessons completed during the month of September. This is more than

ONGOING PROJECTS

Dollar-a-Day Matches:

We sponsored 100 kids during the 2020-2021 school year, and target to sponsor 120 in 2021-2022, along with 12 "Start Investing Now" sponsorships. Stockpile is sponsoring the "Start Investing Now" sponsorships.

Program Development:

- Continuous refinements to the website and MyYIS portal.
- Creating new advanced modules, including lessons on Cryptocurrency, Fintech, Venture Capital and M&A.

Global Stock Pitch

Competition:

- To be held this year in Salt Lake City, Utah.

Gala:

TBD.

double last year's highest month, signally activity rates are strong as clubs are getting started with the new year.

I loved this recent quote from Stephen S. of American Heritage School, Florida because I think it captures so well how a successful YIS school should function: *"I founded my Young Investors Society school chapter last year with my Co-Presidents Sebastian S. and Luke F. Together, we have grown the club to nearly 50 members, two student run classes, and a thriving charity division. Now, I serve as the Student Director of Charity for the YIS Student Advisory Board. I founded my school's YIS chapter because I believe in the need for financial education among youth. Now, as Student Charity Director, I will focus on raising as much funds as possible for that goal."* What a great example of first learning for yourself, and then finding ways to give back.



Stephen S.
American Heritage School,

FY2022 Initiatives & Goals

Our annual Board Onsite meeting in July was a joy to be together, as always. A lot of good ideas and initiatives came out of the sessions. Here are some of the main initiatives that we felt the need to focus on:

- Creating a **framework for International Growth** in each region. Phases of growth with specific targets, from initial Advisory Board, to full local adaptation and staffing.
- Introducing the **"Learn and Earn" App** to students during the FY2021/22 school year.
- **Growing the Access Initiative** mentorship program, preparing to hire a part time employee to oversee and grow Access Initiative partnerships.

We also set and approved the goals for the upcoming year. Continuing the strong growth that YIS experienced last year, this year we set the goal to reach **1,500 schools** (200 of which are Access Schools), reach **8,500 registered participants**, have **500 teams** submit stock pitch reports, and **600 kids to participate in the Dollar-a-Day Challenge** and the Start Investing Now contests. These are lofty goals, but I think we're on track to meet them.

Fundraising

This quarter, we raised \$31,104 as we held our Dollar-a-Day Sponsorship pledges, where we were able to sponsor 100 kids last year who received Dollar-a-Day Scholarships. The letters of gratitude from the students were really touching. I was especially touched by one act of kindness by Jack S. from Poolesville, Maryland who was selected to receive \$365 Scholarship, but instead of accepting it himself, he decided to donate it to an Access student. This is the spirit of community and service that we strive to teach at YIS!

We are also pleased to announce that **Christine Tobin**, our beloved COO of YIS for 5 years, will step up to also take on the role of Director of Fundraising. We have some great momentum right now as we plan for Giving Tuesday, Access Initiative Corporate Sponsors, and we're grateful to Christine for her leadership. We're excited as well that **Jane Winslow** and **Steve Barrus** will continue as the Fundraising Committee Co-Chairs for this year.

I hope that everyone can participate and spread the word of our Giving Tuesday campaign on November 30th. We'll send out the Flyer to each Advisory Board and encourage everyone to fill it

in and share it on social media!

Youth Advisory Board

One of the biggest impacts that we have at YIS, and perhaps one that is underappreciated, is helping youth develop leadership qualities. That is why I am so excited of the tremendous amount of applications that we had for the Youth

“I FOUNDED MY
SCHOOL'S YIS CHAPTER
BECAUSE I BELIEVE IN
THE NEED FOR
FINANCIAL EDUCATION
AMONG YOUTH....”

(STEPHEN S. AMERICAN
HERITAGE HS, FLORIDA)

members of YIS and having made invaluable contributions over his tenure, **Claudio Brocado** will step down from the general board to focus on his much earned retirement. We would like

to sincerely thank Claudio for his enormous contributions, energy and positivity!

We are also happy to report our leadership for Committees

growth of YIS. COVID has had some silver linings, and one of them was that it accelerated online, self-learning and YIS was a key beneficiary. I think the key for us over this next year is to continue to support the momentum, retain all the new schools and teachers, and continue to find ways to adapt and keep making our programs better and better.

I'm looking forward to another great year!
All the best,
James

Advisory Board this year. We ended up selecting 62 students to the 2021/2022 YIS Student Advisory Board from 18 states and 10 countries. See the full list [here](#). The Co-Presidents that were elected this year are two exceptional girls, **Charvi G**, from Westlake HS, California and **Kaviya K**, from Poolesville HS Maryland. We had so many applicants that we selected 10 Student Advisory Board Officers (pictured to the right).

Board Updates

After six years on the Board as one of the original board

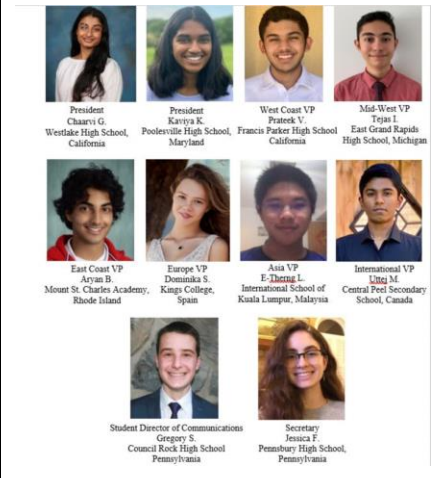
for the 2021/2022 year. The Fundraising Committee be chaired by **Jane Winslow** and **Steve Barrus** again, the newly formed Access Initiative Committee will be chaired by **Patricia Ball** and **Vielcka Mansukhani** and the Programs Committee will be chaired by **Christine Tobin** and **Bryan Jack**. Thanks to all of you for your support and the incredible team of volunteers from around the world.

Conclusion

It's hard not to be excited to see the acceleration of the

YOUNG INVESTOR SNAPSHOT

Young Investors Society 2021-2022
Elected Student Advisory Board
Officers



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.