

“WHAT I’VE LEARNED” THROUGH YIS

Highlights from the 25 Days of Giving Campaign

This year we again held a fall fundraiser around Giving Tuesday and promoted 25 Days of Giving Campaign. One of my favorite parts was reading each day a social media post from a student of “What I’ve Learned” from YIS.

Some great quotes from students included:

“I’ve learned nearly everything I know about investing from YIS, from stocks to even real estate investing, I can now confidently say that I will understand how to manage my money in the future”.

- Aryan B., Rhode Island

“YIS has opened an enormous amount of opportunities for me, starting from Dollar-A-Day Challenge to CYIA Designation and showed me the power of community making changes starting

from small actions”.

- Dominca S., Spain

“Through YIS I have learned the fundamentals of investing and financial planning. I have also learned and developed my public speaking and research skills through the YIS Stock Pitch Competition”.

- E Theng L, Malaysia

“My time at YIS has taught me the importance of providing everyone access to financial literacy resources, not solely the privileged”.

- Uttej M, Canada

“The thing that YIS has taught me about investing is patience. The content always reminds me that investing is about the long-term, and that short-term price fluctuations shouldn’t deter me from owning shares of a company”.

- Gregory S, Pennsylvania

The full “What I’ve Learned” video can be found [here](#).

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 the sponsor of this years “Start Investing Now” sponsorships.

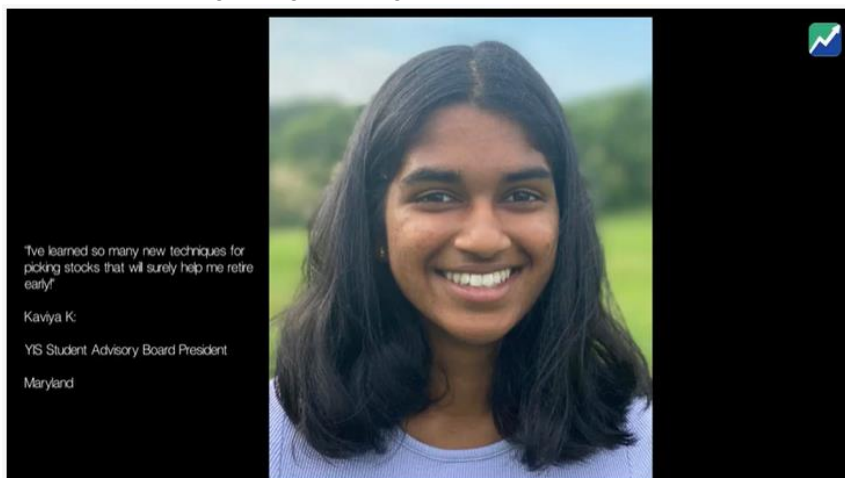
Program Development:

- Introducing International Rollout Framework.
- Rollout of Learn & Earn App.
- Continuous refinements to the website and MyYIS portal.

Global Stock Pitch

Competition:

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



The good news is that with the fast pace of growth of YIS, reaching 1,150 schools this quarter, more and more students will now have the opportunity to learn all of these life-changing

skills quoted above.

School Growth

This quarter, we added **88 new schools** and 556 new registered students to

reach a total of 1,150 schools. We saw especially strong growth in new schools from India, New York, Connecticut, California, and added our first new schools in Taiwan and the Czech Republic. YIS is now active in 24 countries around the world!

Dollar a Day Matches

One of the highlights of the YIS 2nd quarter each year is to announce the winners of the first round of Dollar-a-Day sponsorships. This year we had 236 Applicants which was nearly double the amount that applied last year, a great sign.

The essay question was an inspiring one: "Imagine you inherited one million dollars from a distant relative with the condition that you had to spend

it on something other than yourself. What would you do with the money?" We received many tremendous answers, that we put together in a summary document that we are pleased to share. I

"THE THING THAT YIS HAS TAUGHT ME ABOUT INVESTING IS PATIENCE. THE CONTENT ALWAYS REMINDS ME THAT INVESTING IS ABOUT THE LONG-TERM...."

(GREGORY S, PENNSYLVANIA)

sincerely believe that our Dollar-a-Day sponsorship program is life-changing way to build habits in kids, so it is so great to see the program accelerate its

growth. We will sponsor 120 applicants this year, 50 in the Fall and 70 in the Spring.

International Growth

With YIS now in 24 countries, and having seen the power of strong Advisory Boards to help strengthen regions and build the YIS network around the world, we've developed a plan to add more structure to International Growth, with key milestones for each stage of growth, from Market Introduction to full YIS Localization. We will be sharing the International Growth plan and structure with each Regional Advisory Board in the coming weeks. We look forward to adding new Advisory Boards in growth areas such as India, Europe and Latin America.

Fundraising

This quarter, we raised \$90,898 as we held our annual 25 days of Giving Campaign. I want to sincerely thank all those that donated, as well as all those that spread the word to their companies, through social media and to other potential donors. It was our biggest Giving Campaign yet!

We are also happy to announce that we have received confirmation of a \$60,000 donation from **Grandeur Peak Global Advisors**, who will be making the donation in conjunction with the YIS Access Initiative. This is actually the largest one-time cash donation yet to YIS, and we are truly grateful to the Grandeur Peak team. We thank our regional advisory board member **Tyler Glauser**, who works at Grandeur Peak, for spearheading the effort. I would also like to mention the contribution of YIS Regional Advisory Board member **Brady Stratton**, who helped revamp our Access Initiative pitch deck and materials for the Campaign.

Hopefully this is a sign of many more Access Initiative Corporate Donations to come, which is such a meaningful way to give back.

Upcoming Events

We are entering the busy season of YIS where we have

Investment Symposiums planned for the Global, Hong Kong and India again this year, to take place in March. We will also have the Stock the Shelves Campaign in the 1Q of the year where clubs are encouraged to collect food for community donations. And following that, the Global Stock Pitch Competition, which promises to be our biggest and best yet!

The Global Stock Pitch Competition will take place in Salt Lake City this year at the University of Utah campus, which should be a fantastic facility for the kids to gather, learn and compete. The event will take place on **Friday May 20th**, so be sure to mark your calendars and book your flight if you would like to join!



YIS Club at Desert Mountain HS, Arizona

Guidestar Gold Staus

Another exciting update is that this quarter Young Investors Society was upgraded to "Gold Status" by Guidestar Charity Rating, for high levels of transparency, impact and governance.

This is a key achievement that will help us stand out as we apply for grants in the future, and a sign that we are following best practices for non-profits. Thanks to Christine for excellent work here in getting us to a Gold rating and to Bryan for keeping the books and the audits so diligently.

Conclusion

It's hard not to be excited to continuing growth and impact of YIS, especially as we think about the momentum that we're seeing in the Access Initiative and the International Rollout.

I loved seeing the "What I've Learned" quotes, and to see all the many different ways that YIS is touching lives, from investing knowledge, to leadership experience, to public

speaking, to personal finances and even teaching patience and long-term thinking.

I'm so grateful to be along this journey with each of you.

Investors can change the world!
James

YOUNG INVESTOR SNAPSHOT

Darius C (Raffles Institution, Singapore)

Darius is a high school student and President of the first YIS club in Singapore at Raffles High School. He recently earned the CFA Institute Investment Foundations Certificate through YIS, and now hopes to pursue a career in investment management in the future.



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.