



# MAR 2022 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

## POSITIVE IMPACTS

### YIS Influencing Universities

One of the things that we try to measure is the ongoing impact that YIS students are having after they graduate from high school. This quarter, I received a number of letters from former YIS students who spoke about their success and impact in their colleges.

**Brian Boyer**, A Professor at Brigham Young University told me that they admitted only two Sophomores to the Silverfund, the student investment fund for Undergrads and MBA students, and they were both former YIS students. He said "The only students that I will take that early

into the program are former Young Investors Society students, because I know they will be well prepared."

I also heard a great update from

**Alexander Burt**, a former YIS student, who is now leading the Finance Club at Brown University.

**Laurn Wang**, a former YIS student is leading the Youth & Development program at UCLA also reached out later that same week to talk about her success.

These are just small examples of YIS students making a positive impact as they move on to college. We've now had our YIS students go on to over 75 Universities throughout the world.

What this brings is a powerful benefit to current and future YIS students, as Young Investors Society is building a strong

reputation among Universities, helping future YIS kids get admitted into colleges of their choice. Of all of the benefits of YIS to kids, I think helping them get into their top choice

"THE ONLY STUDENTS THAT I WILL TAKE THAT EARLY INTO THE PROGRAM ARE FORMER YOUNG INVESTORS SOCIETY STUDENTS, BECAUSE I KNOW THEY WILL BE WELL PREPARED"  
(BYU UNIVERSITY PROFESSOR)

## 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:

- Development of Advanced Curriculum to be ready by Fall 2022.
- Rollout of Learn & Earn App.

### Global Stock Pitch

#### Competition:

- Fundraising Dinner Thursday May, 19<sup>th</sup> at Joseph Smith Memorial Building in SLC, Utah
- Global Stock Pitch Finals May 20<sup>th</sup> at University of Utah.

college is an especially tangible benefit that we can measure. I am grateful to YIS All-stars like Lauryn and Alex that have represented YIS so well, and paved the path for future students.

## An Exciting March

March was an exciting month with the YIS Investment Symposiums in Hong Kong, India and the US, the Shark Tank Contest, the announcement of the Dollar a Day winners for the Spring, and the submissions of over 300 teams reports and videos that will participate in the Stock Pitch Competition this year!

The Investment Symposiums were outstanding. We were honored to have had such amazing speakers be a part of these events this year!

Thank you to **Kenneth Fong, Catherine Chen, Sandipan Roy, Simon Maisey, William Tarr, David Lee, Adam Millson, Kelly Fuller, and Suzanne Sarka** for being guest speakers at the events and for sharing their knowledge and

experience. We were also fortunate to have Oxbow Capital & NetDragon as event sponsors as well as Credit Suisse, Tradeweb, and WIFA as event partners.

If you missed any of the events, you can watch them on our YouTube channel:

**India Investment Symposium:** [YIS India Investment Symposium](#)

**Hong Kong Investment Symposium:** [YIS Hong Kong Investment Symposium](#)

**Global Investment Symposium:** [YIS Global Investment Symposium](#)

We are also happy to announce that Gabriel P. from Cape Coral High School in Florida won the Shark Tank Competition this year, and will win an Apple Macbook and an interview with Private Equity investor, **Richard Folsom** of Advantage Partners. Congratulations to all the winners.

## School Growth

We are pleased to have added an additional 116 schools this quarter, with 14 of the new

quarterly growth of new schools this year. Christine did a great job hosting a MoneyWi\$e Conference for 54 teachers in Colorado which helped add to new school growth, as well as the positive publicity from participation in the Investment Symposiums added to the new schools this quarter.

## New Hires

This quarter, we are extremely happy to announce two new members of the YIS team, **Jayme Hoffeig** and **Nick Murja**.

Jayme will join as a Community Coordinator for the YIS Access Initiative. We are so thrilled to have Jayme join us, she has great experience with non-profits and has worked with Christine previously at the Girl Scouts of America. This will add to our ability to expand our partnerships and mentorship programs with the Access Initiative which has now reached 157 schools across the world.

Nick has been hired as a Curriculum writer, with a focus on developing our new Advanced Curriculum for 3<sup>rd</sup> and 4<sup>th</sup> year YIS students. Nick has been a long-time YIS teacher, hosts the YIS Global Virtual club each week, and is a passionate teacher of Finance for teens. We have many exciting lessons in development, as requested by



YIS Club at Denmark High School, Georgia

schools being Access Schools, to reach **1,266 total YIS schools**. This quarter was actually the highest

the Youth Advisory Board, including topics such as cryptocurrencies, hedge funds, fixed income, real estate, PE/VC and more advanced stock valuation techniques. The lessons will be ready by next school year in the Fall and will be in high demand from the students!

## Fundraising

This quarter, we raised \$90,886 as we received a \$61,000 donation from Grandeur Peak for the YIS Access Initiative. We also had corporate sponsorships for the YIS Investment Symposiums and generous donations from board members. This is incredible and had a direct link to us being able to fund the Access Initiative coordinator to spread our reach within underserved communities and to invest in new curriculum and lesson plans.

The end of the year Stock Pitch Competition and Fundraising dinner in Utah is another great fundraising opportunity. Thanks to each of you for all of your efforts on fundraising outreach.

## Upcoming Events

It's the most exciting time of the year as we approach the Global Stock Pitch Competition. The state winners are being announced, and the Regionals will take place over Zoom during April and May. And then the Global Finals will take place in Salt Lake City this year at the University of Utah campus. On **Thursday May 19<sup>th</sup>** at 6pm we will have an Annual Celebration Fundraising dinner in downtown Salt Lake and then the next day on **Friday May 20<sup>th</sup>** will be the day of workshops and competition for the regional winners. We are excited that CAIA Executive Vice President, **John Bowman**, will speak at the Thursday dinner and **John Skjervem**, CIO of the Utah Retirement Systems \$54B portfolio will be the keynote speaker on May 20<sup>th</sup>. Be sure to mark your calendars, we would love to have as many as we can helping out with the event.

## Conclusion

It will be so exciting to gather for the Global Stock Pitch competition in person this year. This was a monumental quarter for YIS with the addition of

Jayme and Nick to the YIS team.

I'm grateful to be reminded of the lasting impact that I know we're making. At high schools, but also as the students go on to Universities and beyond.

Thanks for another great quarter,  
James

### YOUNG INVESTOR SNAPSHOT

**Dominica S.** (King's College, Spain)

Dominika recently completed the CFA Investment Foundations Program. She is the founder of her school's YIS Club and currently serves as the Vice President of Europe on the Young Investors Society Student Advisory Board.



**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.*