



YOUNG
INVESTORS
SOCIETY



Young Investors Society Annual Report 2021-2022

YIS Mission



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.

YIS Principles

YIS 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.

This will be accomplished by pursuing the following principles:

- **Vision:** Young Investors Society seeks to inspire students to think critically for themselves and to evaluate businesses and the world around them with insightful, long-term perspectives.
- **Real-life Experience:** Youth get actual, hands-on experience evaluating companies, building financial models, and buying and selling stocks.
- **Leadership:** Each local chapter of the Young Investor Society is run by the students, recommending and investing in stocks themselves, organizing business and financial professional visits, and mentoring new members.
- **Community:** Young Investors Society members feel that they are a part of something greater than just themselves. They build connections to local businesses, universities and other young investors around the country, as well as the following generation that will take their place once they graduate. Service projects and giving back are important parts of the program each year. Young Investors Society makes special outreach to empower low-income and minority students.
- **Integrity:** Society members are expected to uphold the highest levels of ethical standards in investing, and learn to determine if a target company demonstrates good or poor corporate governance practices.

Board of Directors



Executive Board

James Fletcher, CFA

*Board President
Chief Investment Officer
Ethos Investment Management*

Jane Winslow

*Treasurer
Senior Vice President
Merrill Lynch (Retired)*

Bryan Jack

*Vice President
Chief Financial Officer
First Community Bank-Utah*

Patricia Ball

*Secretary
Investment Counselor
Fisher Investments*

Board Members

Steve Barrus

*Financial Consultant
Advisory Group For Life*

Lee Mackay

*Partner at Nevers, Palazzo, Packard,
Wildermuth & Wynn*

Andrew Davis

*Independent Financial Advisor
WealthSource Partners*

Dave Miles, CFA

*Research Analyst
Fidelity Investments*

Lucy Chuah

*Investment Analyst
GQG Partners*

Claudio Brocado

*Head of Global Equities
Nuclo Independent CIO*

Laura Geritz

*Chief Executive Officer
Rondure Global Advisors*

Vielcka Mansukhani

*Head of North America Equity
Sales at Bradesco*

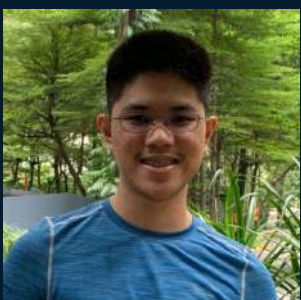
Mark Van Cott

*YIS Advisor at International School
of Kuala Lumpur, Malaysia*

Christine Tobin

*Chief Operating Officer
Young Investors Society*

Student Advisory Board



Elected Officers

President: Chaarvi G: Westlake High School, CA
President: Kaviya K: Poolesville High School, MD
West Coast VP: Prateek V: Parker High School, CA
East Coast VP: Aryan B: Mount St. Charles, RI
Mid-West VP: Tejas I: East Grand Rapids, MI
Asia VP: E-Therng L: ISLK, Malaysia
Europe VP: Dominika S: Kings College, Spain
International VP: Uttej M: Central Peel, Canada
Secretary: Jessica F: Pennsbury High School, PA
Student Director of Comm. Greg S: Council Rock, PA

Members-At-Large

West Coast

Ethan N. Westlake High School, CA
Abhinav P. Westlake High School, CA
Arjun G. Westlake High School, CA
Jennifer L. Westlake High School, CA
Caleb C. San Mateo High School, CA
Gerardo O. Oxnard High School, CA
Rikhav S. Chaparral High School, CA

Mid-West

Neha B: Basis Scottsdale, AZ
Mehul S: Basis Scottsdale, AZ
Humayl A: Basis Scottsdale, AZ
Siddharth M: Basis Scottsdale, AZ
Soham S: Basis Scottsdale, AZ
Fatima A: Basis Scottsdale, AZ
Umar A: Basis Scottsdale, AZ
Siddharth U: Basis-Peoria, AZ
Zack O: Mountain High School, AZ
Raman S: Obra D. Tompkins, TX
Jesus S: Boulder High School, CO

East Coast

Abigale L: Tolland High School, CT
Patrick C: Tolland High School, CT
Connor L: Tolland High School, CT
Reema S: Middlesex County Academy, NJ
Patrick X: Monmouth County, NJ
Jared G: Ranney School, NJ
Youngtaek L: The Masters School, NY
Kevin O: Great Neck South High School, NY
Josephine L: New Utrecht High School, NY
Tristan B: Kingswood Regional High School, NH
Jack S: Poolesville High School, MD
Ryan A: Cox Mill High School, NC
Bianca C: Green Hope High School, NC
Grace B: Avington School, NC
Tanvi J: Independence High School, VA
Shrey S: Denmark High School, GA
Devin S: American Heritage Plantation, FL
Luke F: American Heritage Plantation, FL
Sabastian S: American Heritage Plantation, FL
Gabriel P: Cape Coral High School, FL
Luc B: Phillips Academy, MA

International

Samyukta B: Bombay International School, India
Darius C: Raffles Institution, Singapore
Imran S: Sri Chaitanya College, India
Erica H: International School of Kuala Lumpur, Malaysia
Francesco S: International School-Palermo, Italy
Dishaan P: Indus International School-Bangalore, India
Shikhar B: Nahar International School, India
Jasper L: Renaissance College, Hong Kong
Yoojoeng L: Branksome Hall, South Korea
Ishan V: The Millennium School, Dubai
Adharsh S: Raffles Institution, Singapore
Gunadotya R: New Millennium School, Bahrain
Didarul I: Kushtia Government College, India

Letter from YIS Founder & President, James Fletcher, CFA



Investors truly can change the world! And we are doing it one year, one school and one student at a time.

As Young Investors Society wraps up its 7th year, it's amazing to look back and see that our program has now grown to 1,365 schools in 56 countries! What began with throwing the proverbial rock in a lake has now led to giant ripples that continue to grow and grow. The Global Stock Pitch Competition, the Investment Symposiums, the Dollar a Day Essays, the Online clubs, and the Stock Pitch Showcase were all opportunities that I treasured to interact with these incredible teens around the world.

One of the things I am most proud of this year is to see the strong growth of our Access Initiative program, which serves underserved communities. Access Schools rose from 116 last year to 167 schools this year, a 44% increase. Last year when we were renewing our mission statement and values, the YIS board agreed that we needed to make an extra focus on extending our program of Financial Literacy “to all” individuals, which special emphasis on empowering those from underserved backgrounds. The culmination of this was that Young Investors Society’s Access Initiative was also thrilled to be awarded The Money Awareness and Inclusion 2022 Awards for the best financial literacy project for underserved communities!

We also reached a key milestone by getting enough funding to expand the YIS team. Jayme Hofteig joins as a Community Coordinator for the YIS Access Initiative and Nick Murja worked part-time to write new Advanced Lesson plans. These are key milestones that allow us to extend the reach of YIS to many more underserved communities, with more outreach potential and advanced lesson plans, that will strengthen the total YIS experience for all students.

All of this growth is only possible through the support of our amazing board, regional advisory boards, YIS staff, committed YIS teachers, parents, and especially the YIS student leaders throughout the world. We couldn't do it without each of you!

James Fletcher
Young Investors Society
Founder & President

Letter from YIS Chief Operating Officer, Christine Tobin



I am very proud to say that 2022 has been a year full of amazing progress and growth. The momentum and growth we achieved in 2020-2021 and a strong strategic focus has allowed us to continue flourish and thrive in a post-Covid environment. I can proudly say that we are positioned for a future where every high school student has access to FREE, quality, online financial education even in unpredictable circumstances.

In 2022, YIS Executive Board made the decision to resume in-person stock pitch and fundraising events. Since arriving at the decision, our focus has been on supporting and providing the same quality curriculum and programs that YIS is known for. Additionally, we continued the weekly YIS Global Online Club for students who didn't have a physical club to meet with that allowed students to continue to interact within a safe, online club environment. We are committed to providing stability and structure for our YIS students and will continue to provide the events, contests, and new programming that they have come to love over the years.

We successfully held an online Giving Tuesday and a couple of in-person fundraising events to support our programs Access Initiative and were amazed at the generosity and support from our YIS Boards and donors.

One of the important commitments we are making as we move into the future is the expansion of our Access Initiative. Over the past four years, we have continued to expand into underserved areas to provide access to quality financial literacy curriculum. We have partnered with other non-profit organizations to strengthen our impact in these underserved communities as well as hired a part-time staff member to help continue to grow and expand the program. The YIS Access Initiative was awarded the Money Awareness and Inclusion Award for The Best Financial Literacy Program for Underserved Communities in 2022.

From membership progress to program participation progress, this past year has been one of commitment, engagement, and forward movement. I am grateful to the YIS Board, Regional Advisory Boards, Committees, and our Executive Leadership Team for all that we have accomplished this year. Together we have established an incredibly strong foundation for progress and growth for many years to come.

Christine Tobin
Young Investors Society
Chief Operating Officer

THE WORK THAT WE DO

MEMBERSHIP IMPACT



1300+

SCHOOLS



8500+

STUDENTS
***est.**



600+

TEACHERS

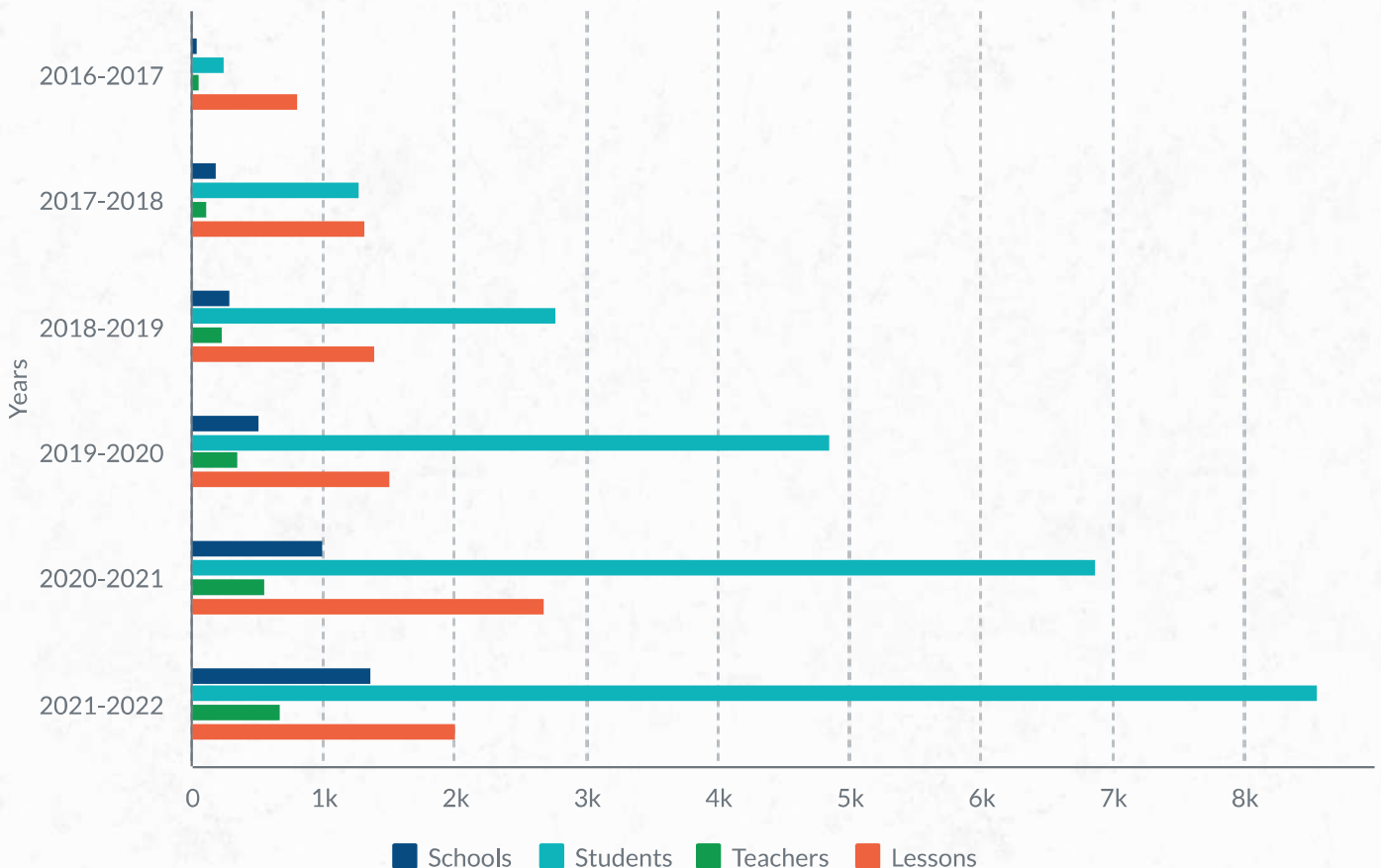


9000+

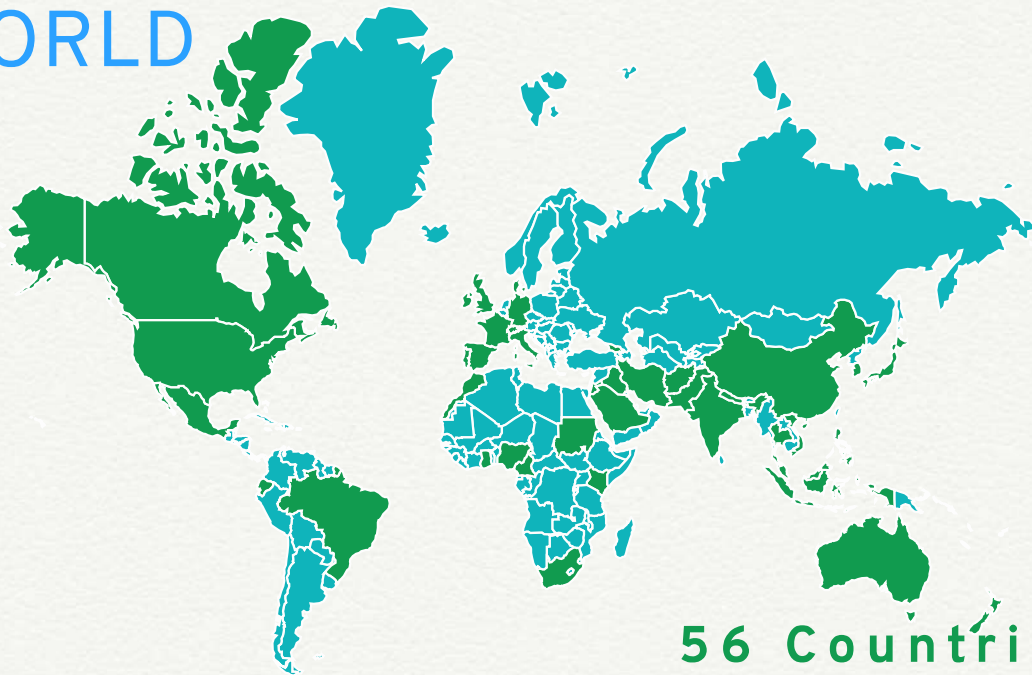
**LESSONS
COMPLETED**

*Estimated students includes students that use our curriculum in the classroom and students that have attended YIS events.

Membership Metrics



YIS SCHOOLS ACROSS THE WORLD



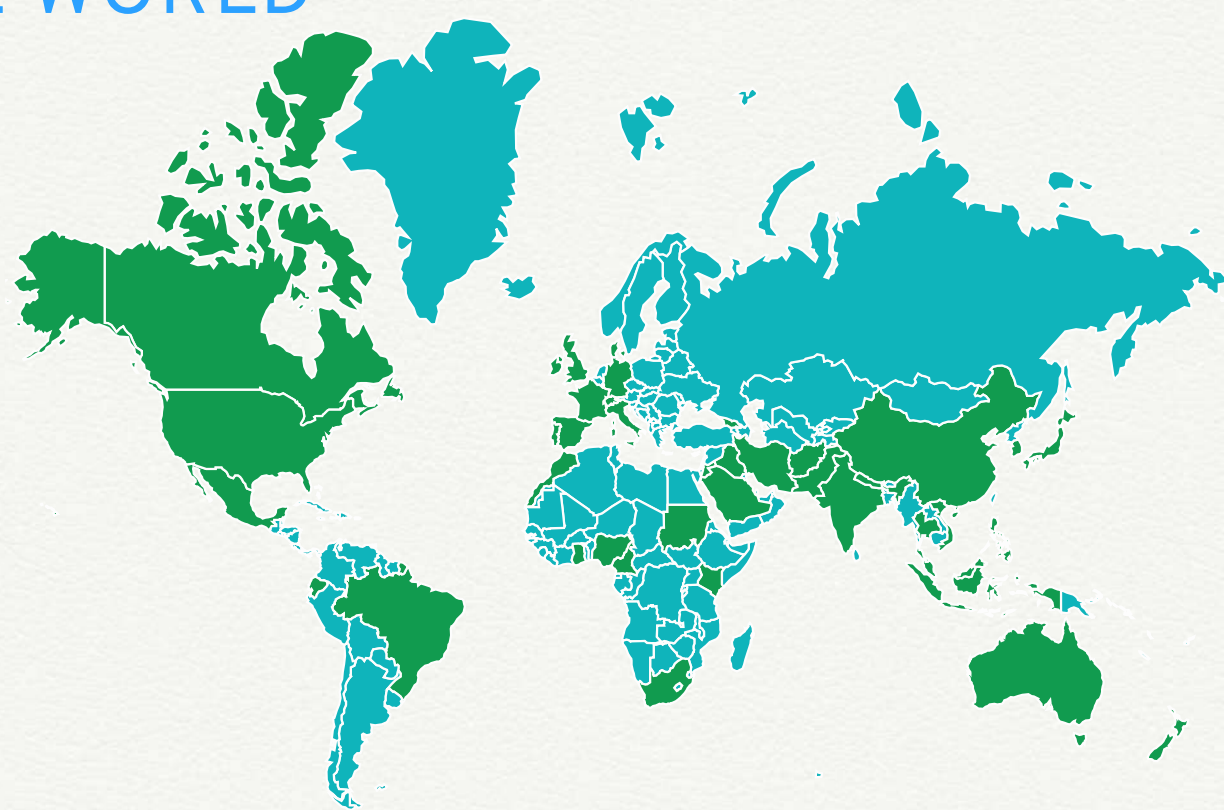
45 U.S. States

Alabama	Mississippi
Alaska	Missouri
Arizona	Montana
Arkansas	Nebraska
California	Nevada
Colorado	New Hampshire
Connecticut	New Jersey
Delaware	New Mexico
Florida	New York
Georgia	North Carolina
Hawaii	Ohio
Idaho	Oregon
Illinois	Pennsylvania
Indiana	Rhode Island
Iowa	South Carolina
Kansas	South Dakota
Kentucky	Texas
Louisiana	Utah
Maine	Vermont
Maryland	Virginia
Massachusetts	Washington
Michigan	Wisconsin
Minnesota	

56 Countries

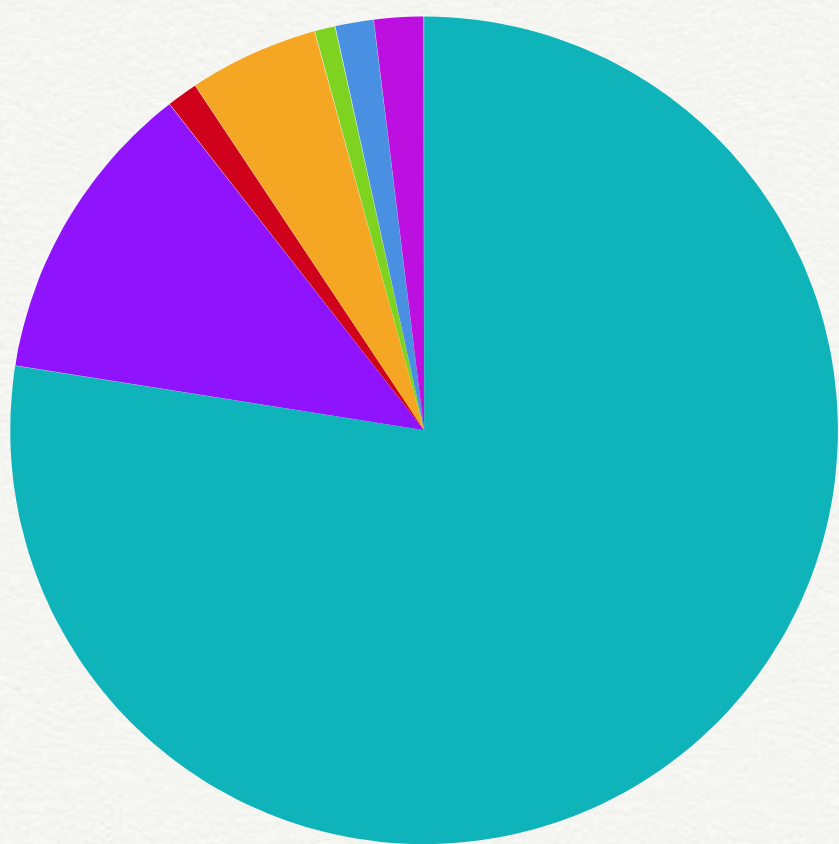
Australia	Malaysia
Belgium	Mexico
Bolivia	Morocco
Brazil	Netherlands
Canada	Nigeria
China	Norway
Colombia	Pakistan
Costa Rica	Philippines
Czech Republic	Portugal
Denmark	Puerto Rico
Dubai	Qatar
Egypt	Saudi Arabia
England	Scotland
Germany	Singapore
Ghana	Slovenia
Greece	South Africa
Guatemala	South Korea
Hong Kong	Spain
Hungary	Sri Lanka
India	Switzerland
Indonesia	Taiwan
Ireland	Thailand
Israel	Trinidad
Italy	Turkey
Japan	UAE
Jordan	United Kingdom
Kuwait	United States
Lithuania	Vietnam

YIS SCHOOLS ACROSS THE WORLD



Number of Schools

United States: 1003
Asia: 185
Europe: 52
Canada: 48
Middle East: 30
Africa: 26
Latin America: 12

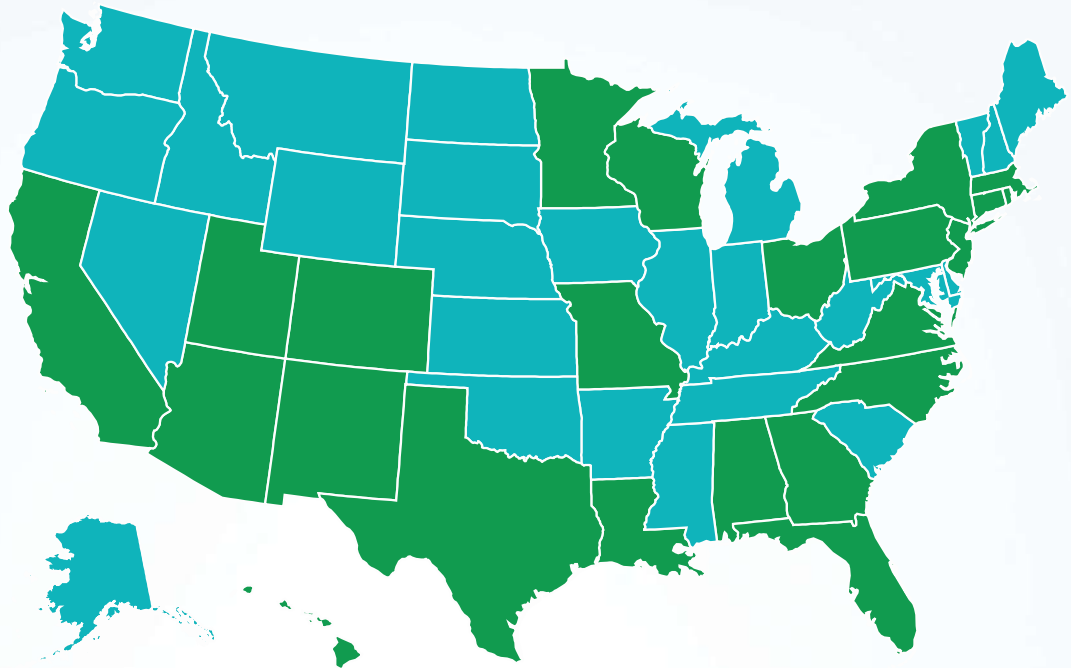


United States (77.51%)	Asia (11.96%)	Latin America (1.22%)
Europe (5.07%)	Middle East (0.81%)	Africa (1.52%)
Canada (1.93%)		

YIS ACCESS INITIATIVE


167+
SCHOOLS


22
STATES



YIS Access Initiative Goals

The YIS Access initiative provides access to FREE, quality, financial literacy education, diverse mentors, STEM career education, and scholarships to a variety of talented students in underserved communities.

Understanding Impact on Youth

A study by the US Department of Health and Human Services (DHHS) analyzed census data from 2008 and found that household income dramatically impacts youth outcomes. Youth from low-income families are more likely to be teen mothers, engage in gang activity and delinquent behaviors, and are less likely to graduate from a 4-year college than are youth from middle-income and high-income families.

Impact Statistics:

- 40% of children in the United States lived in low-income families, families with incomes at or below 200% of the federal poverty level (ASPE).
- Nearly 1/3 of youth from low-income families (29%) fail to earn high school diplomas (ASPE).
- Only 1/10 of youth from low-income families (10%) go on to graduate from a four-year college (ASPE).
- 2/3 of High School students fail a basic financial literacy test (JumpStart).

THE WORK THAT WE DO

PROGRAM IMPACT



START INVESTING
NOW

190



DOLLAR-A-DAY
CHALLENGE

368



DOLLAR-A-DAY
SCHOLARSHIPS

120



MONEY SKILLZ
BOOTCAMP

238



STOCK PITCH
COMPETITION

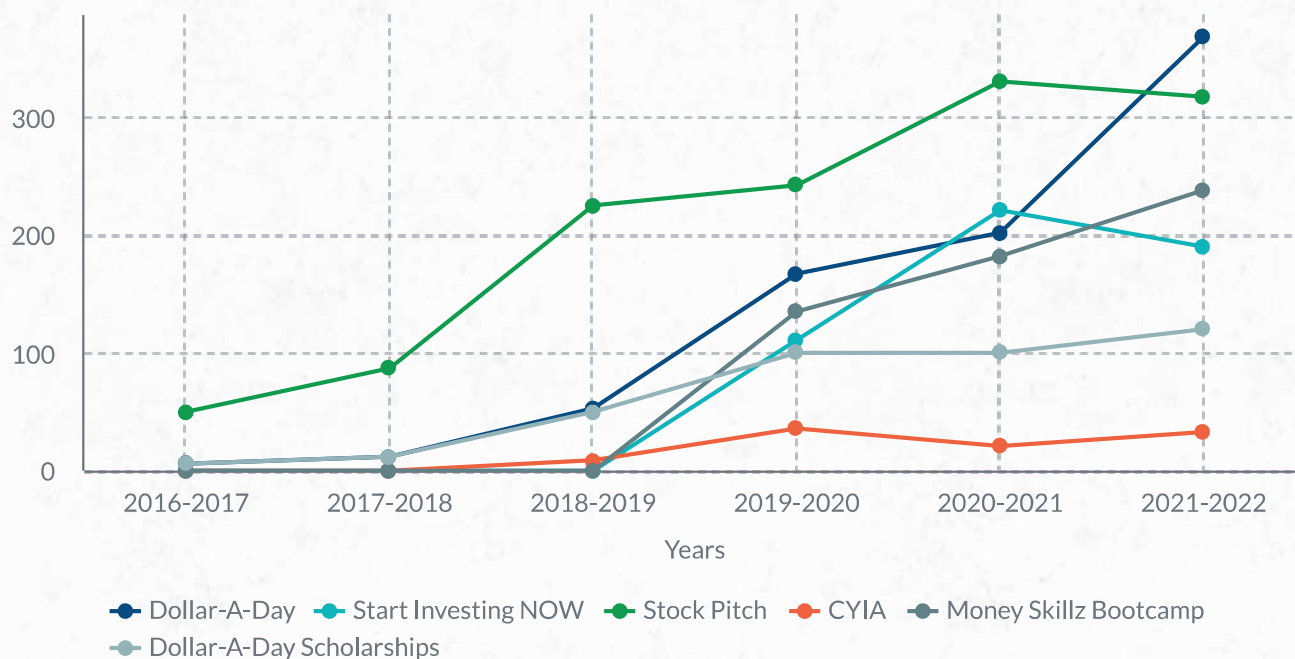
317



CYIA
DESIGNATION

33

Program Metrics



2021-2022 Program Highlights

Community Champions



YIS had 4 school clubs participate in the Stock the Shelves Food Drive that collected food for local food pantries and shelters. They raised over \$1,000 for the YIS Access Initiative and over 1,500 lbs of food!

Global Investment Symposiums

MARCH 24 2022
4-6PM(PST) / 7-9PM (EST)

YOUNG INVESTORS SOCIETY
GLOBAL INVESTMENT SYMPOSIUM

JOIN US FOR THE 2022 GLOBAL INVESTMENT SYMPOSIUM.
INVESTMENT AND FINANCE PROFESSIONALS WILL LEAD DISCUSSIONS IN:

BLOCKCHAIN & NFT'S
RISK DIVERSIFICATION
INVESTMENT BANKING,
IMPACT INVESTING
PROGRESSION OF INVESTING,
...AND SO MUCH MORE!

DAVID S. LEE
PRINCIPAL, LECTURER
AT UNIVERSITY OF HONG KONG

KELLY FULLER
MANAGING DIRECTOR
BMO CAPITAL MARKETS

ADAM MILLSON
ANALYST AT ADMINISTRATION

SUZANNE SARKA
FOUNDER & CEO
PAULI CAPITAL INVESTMENT FUND

JAMES FLETCHER
FOUNDER & COO
ETHOS INVESTMENT MANAGEMENT

[HTTPS://YIS.ORG/EVENTS/](https://yis.org/events/)

ETHOS **MORNINGSTAR** **BMO** **Capital Markets** **YOUNG INVESTORS SOCIETY**

JOIN US ON ZOOM VIDEO!

YOUNG INVESTORS SOCIETY

Hong Kong

Investment Symposium

NetDragon **Tradeweb** **OXBOW** **WiFA** **CREDIT SUISSE**

YIS held 3 Investment Symposiums (Hong Kong, India & U.S.) Each symposium had professional speakers present on a variety of topics including Blockchain & NFT's, Risk Diversification, Investment Banking, Impact & ESG Investing, and so much more. Over 150 students participated in these events.

Dollar-A-Day Challenge



The YIS Dollar-A-Day Challenge had a total of 368 participants for the Fall & Spring rounds. Each participant submitted their essay on the following topic:
If you inherited 1M dollars from a distant relative and you could not use the funds on yourself, what would you do with the money?
120 students were selected to receive the Dollar-A-Day FREE Money Match Scholarship for the 2021-2022 school year.

YIS Shark Tank Contest



1st Place: Gabriel P. (Cape Coral High School, FL)
2nd Place: Rohit V. (Basis Silicon Valley, CA)
3rd Place: Brian C. (Taipei American School, Taiwan)

We were honored to have investor and YIS Board Member, Richard Folsom for our guest interview for the YIS Shark Tank Contest.

YIS Global Stock Pitch Workshops



This year, the YIS Global Stock Pitch Workshops were hosted by Grandeur Peak Global Advisors in Salt Lake City, Utah. Students rotated through 4 workshops in What Is Your WHY?, ESG Investing, Careers in Finance, and a Case Study.

YIS Global Stock Pitch Competition



1st Place: Shant & Cameron (California)
2nd Place: Harsha (Virginia)
3rd Place: Jessica & Brady (Pennsylvania)
Honorable Mention: Jesus & Mehul (Colorado)
Most Creative: Ronan (Washington)

YIS had 317 teams from 22 states and 9 countries participate in the state/territory stock pitch competitions. The winners from each event were invited to participate in one of 6 Regional Stock Pitch Competitions where the top team(s) from each region are invited to our Global Stock Pitch Competition on May 19-20 in Salt Lake City, Utah.

2021-2022 Highlights

YIS Access Initiative



The YIS Access Initiative achieved a growth of 44% this year serving 165 schools and over 1,100 students. We were awarded the Money Awareness & Inclusion Award for the Best Financial Literacy Program for Underserved Communities for 2022. We recently hired a part-time Community Coordinator to help grow the program.

Invest in the Future Dinner & Fundraiser



The YIS Invest in the Future Dinner & Fundraiser event was held at the beautiful Joseph Smith Memorial Building in SLC, Utah. Local investment firms were in attendance as well as State Treasurer, Marlo Oaks. John Bowman from CAIA was the keynote speaker and Kaviya K. from Maryland received the Student Leader of the Year Award.

2021-2022 Outstanding Teacher Awards



Matt Bastan: [The FLY Initiative, Rhode Island](#)

Marcy Reyes: [The FLY Initiative, Rhode Island](#)

Aaron Randolph: [Carolina Youth Coalition](#)

Nick Murja: [Palo Duro High School, Texas](#)

Rhys Thomas: [Renaissance College, Hong Kong](#)

Ho Ching Lau: [Renaissance College, Hong Kong](#)

Mike Zisa: [Pennsbury High School, Pennsylvania](#)

Mariana Garza Villalobos: [Inverkids, Mexico](#)

Wei Wang: [Gateway Academy, California](#)

Mark Van Cott: [International School of Kuala Lumpur, Malaysia](#)

Fong Mei Lan: [HKSKH Bishop Hall Secondary School, Hong Kong](#)

Ho Siu Kwong: [HKSKH Bishop Hall Secondary School, Hong Kong](#)

Dana Johnson: [BASIS Scottsdale Charter School, Arizona](#)

Kathy Marshall: [Tolland High School, Connecticut](#)

Mark Haak: [Brophy College Prep, Arizona](#)

Brian Boyer: [Springville High School, Utah](#)

Angela Maher: [Mountain View Academy, Washington](#)

William Anderson: [Sussex County Technical School, New Jersey](#)

2021-2022 Corporate Sponsors & Partners

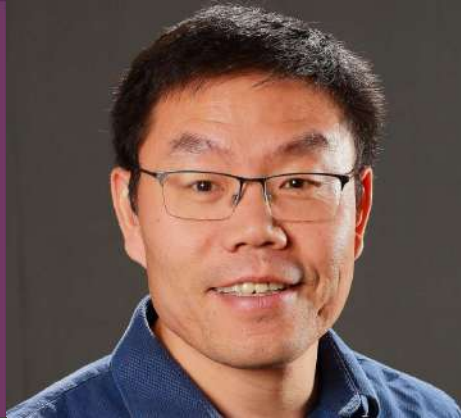
We are honored to have the following sponsors and partners support Young Investors Society during the 2021-2022 school year. Due to the generosity of our sponsors, we were able to continue to provide curriculum and programs to over 6,000 students across 45 states and 56 countries.



Thank You For Your Support Teacher Testimonials

"My students LOVE the competitive aspects of YIS including the Shark Tank competition and the Stock Pitch competition. The ability to work independently to extend their own thinking and learn using the CYIA and CFA program is a HUGE hit with my students."

Kathy M.
Tolland High School,
Connecticut



"We are using Young Investors Society curriculum at our school and we love it. Love seeing the students participate in the session."

Colorado Money Wiser
Conference
2022



"Thanks so much for all that you do to provide this curriculum and programs to youth."

Angela M.
Mountain View Academy,
Washington



"Lots of great resources to get students engaged about financial literacy. Loved the teacher session!"

Utah \$mart \$tart Conference
2022



"The importance of financial education for students, where PFL is not a graduation requirement and how to get this integrated into schools (even through a club setting) is a great resource."

Colorado Money Wiser
Conference
2022



"We started a YIS club a while ago, but had a student really get interested and she and her board, ran the program the whole year!"

Bonnie M.
El Segundo High School,
California



Young Investors Society

31248 Oak Crest Drive Suite 200
Westlake Village, CA. 91361
(805) 479-5292
www.YIS.org



Thank You For Your Support

Student Testimonials

"It is because of opportunities like the Young Investors Society that I have been able to develop not only my personal knowledge of financial markets and the investment industry, but also those around me."

Luke F.
American Heritage School,
Florida



"I think YIS is a wonderful organization, and I've certainly gained many valuable experiences from it: I have participated in major events like the Dollar-a-Day Challenge, Global Stock Pitch Competition, and the CFA Investment Foundations Program."

Christiana S.
Mount Everest Academy,
California



"Thank you so much for everything! You are literally changing people's lives even from the other side of the world. It means a lot to me!"

Francesco S.
International School of
Palermo,
Italy



"Being a part of YIS these last 3 years has been an honor and I'm excited to help lead the next generation as a senior. Thank you for all the opportunities."

Ryan A.
Cox Mill High School,
North Carolina



"YIS has allowed me to further my knowledge of investing and the responsibilities and research that come with investing."

Abigale L.
Tolland High School,
Connecticut



"YIS has allowed me to reach my full potential by earning the CYIA designation and I want to contribute to the growth of YIS in return."

Felix P.
Diamond Bar High School,
California



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