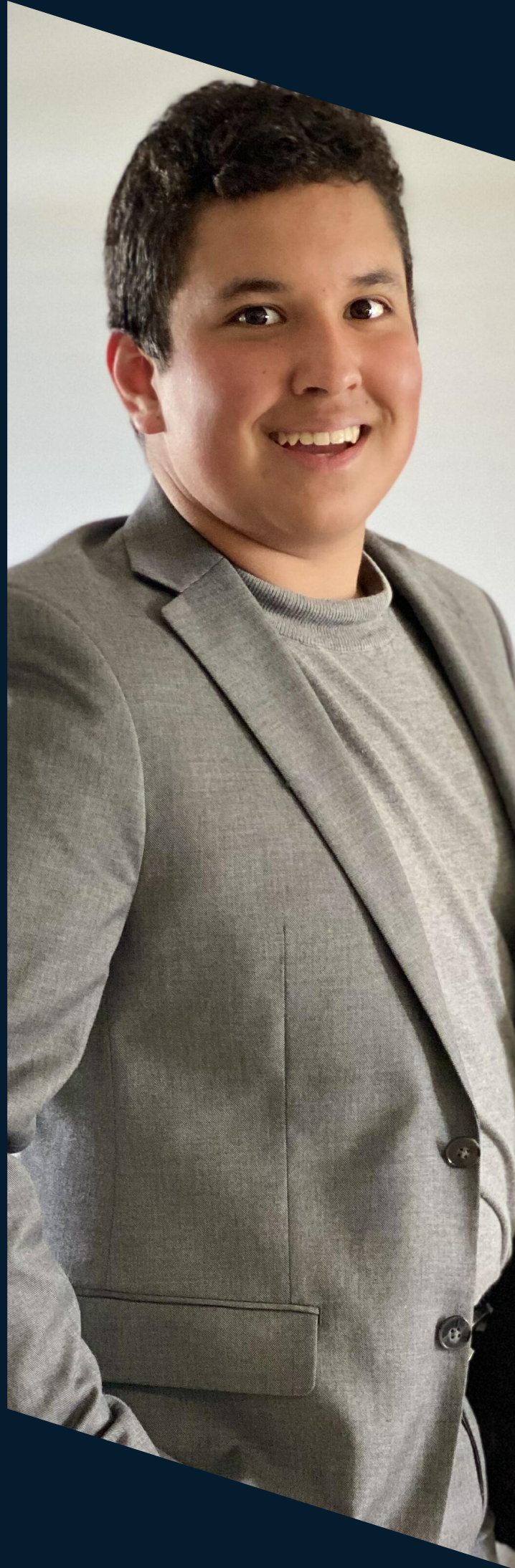




YOUNG
INVESTORS
SOCIETY



Young Investors Society
Annual Report
2020-2021

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
Portfolio Manager at
APG Asset Management*

Jane Winslow

*Vice President
Senior Vice President at
Merrill Lynch (Retired)*

Bryan Jack

*Treasurer
Certified Public Accountant*

Dave Miles, CFA

*Research Analyst at
Fidelity Investments*

Lucy Chuah

*Equity Sales at CSLA Americas,
LLC (Former)*

Claudio Brocado

*Head of Global Equities at Nuclio
Independent CIO*

Matt Welling

Vice President at Wasatch Advisors

Vielcka Mansukhani

*Head of North America Equity
Sales at Bradesco*

Mark Van Cott

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

Patricia Ball

*Investment Counselor at
Fisher Investments*

Christine Tobin

*Chief Operating Officer
Young Investors Society*

Board Members

Lee Mackay

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

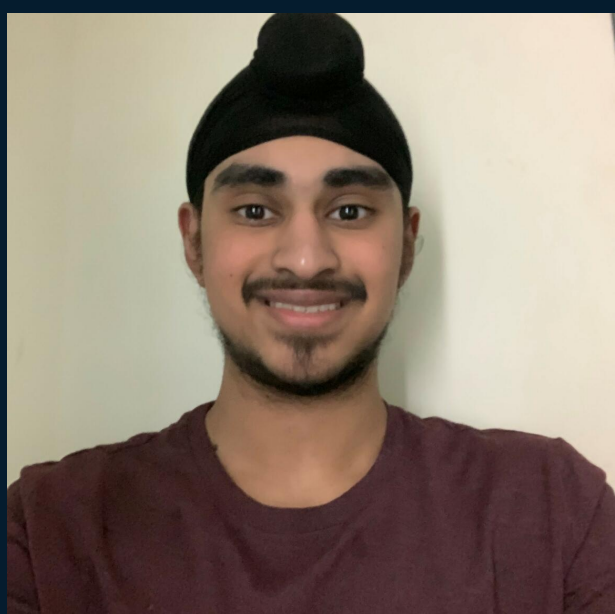
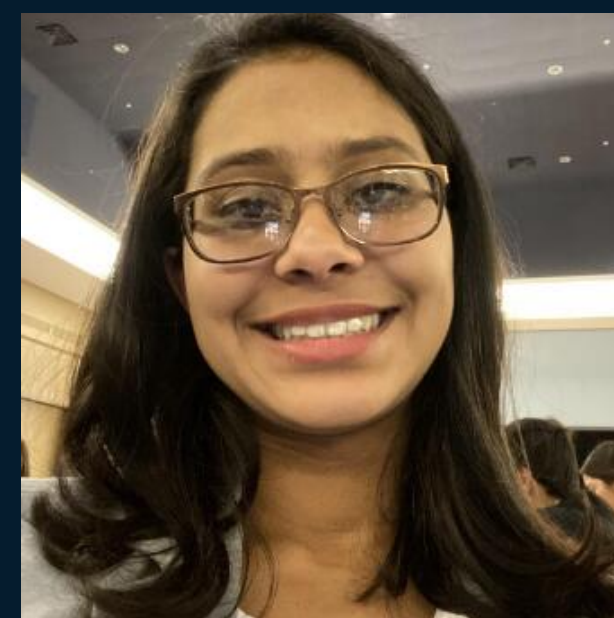
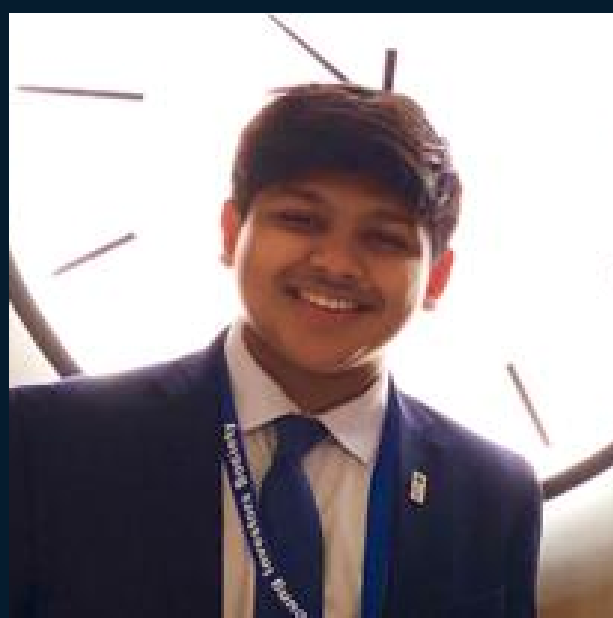
Steve Barrus

*Vice President Financial Consultant
at Fidelity Investments*

Andrew Davis

*Independent Financial Advisor
at WealthSource Partners*

Student Advisory Board



Elected Officers

President: Saumya J. Bellaire High School, TX
West Coast VP: Chaarvi G. Westlake High School, CA
East Coast VP: Rushikesh M. Bridgewater-Raritan, NJ
Mid-West VP: Neha B. Basis Scottsdale, AZ
North Asia VP: Keilyn T. Shibuya Makuhari, Japan
South Asia VP: Navin K. Int. School-Bangkok
Secretary: Saurabh K. WT Woodson, VA
Student Director of Social Media: David B. Bellaire , TX

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

Wesley P. Basis Scottsdale, AZ
Ethan W. Basis Scottsdale, AZ
Mehul S. Basis Scottsdale, AZ
Alex B. Basis Scottsdale, AZ
Ritsuki K. Bellaire High School, TX
Raman S. Obra D. Tompkins, TX
Tejas I. East Grand Rapids, MI
Alen H. Palo Duro High School, TX
Soham J. Columbus Academy, OH

Members-At-Large Cont.

East Coast

Ava H. Brockton, MA
Lexi J. Brockton, MA
Luc B. Philips Academy, MA
Jessica F. Pennsbury High School, PA
Brandi C. Sussex County Tech, NJ
Kaviya K. Poolesville High School, MD
Jack S. Poolesville High School, MD
Amruth N. Poolesville High School, MD
Sarah L. Baltimore Polytechnic, MD
Rohan R. Downingtown STEM Academy, PA
Pranay B. East Brunswick, NJ
Arya T. Bridgewater-Raritan, NJ
Abigale L. Tolland High School, CT
Kelly R. New Utrecht High School, NY
Dimitri H. Holy Cross High School, NY
Jonah L. Mamaroneck High School, NY
Suraj S. FLY Initiative, RI
Ryan A. Cox Mill High School, NC
Pranav M. J.P Stevens High School, NJ
Gabriel P. Cape Coral High School, FL

International

Minhee H. Renaissance College, Hong Kong
Jasper L. Renaissance College, Hong Kong
Ching Y. Ying Wa College, Hong Kong
Siddhant M. International School, India
Joshua M. Young Investors Network, Ghana
Brendan V. International School-Malaysia
E-Therng L. International School-Malaysia
Sophia L. International School-Malaysia
Christian V. International School-Malaysia

Letter from YIS Founder & President, James Fletcher, CFA



What a year it has been for Young Investors Society! As I write this (on July 21, 2021) it's a momentous day, as Young Investors Society has just reached its 1,000th school around the world! Of these, 200 are from outside the US in 22 different countries, and 115 are from underserved communities through our Access Initiative. For the year, Young Investors Society doubled in most metrics (# of schools, participation rates in Stock Pitch, Dollar a Day and Shark Tank Competition, lessons completed) and it is exciting to see the organization continue to grow throughout the world.

I am still blown away by how far this has come, starting from teaching a group of teens in my living room every Wednesday evening about Finance six years ago, to piloting 6 schools with lessons on Personal Finance and Investments, to building a world-class organization led by incredible board member volunteers, and now to reach 1,000 schools around the world. Thanks to so many in our industry for stepping up and giving back to make this happen.

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. - It means 1,000 times more chances for kids to start the habit 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 that are being changed forever.

"Investors can change the world!" This has been adopted as our new tagline and vision this year, and we're seeing it play out before our eyes. And I'm grateful to all of you for your support.

James Fletcher
Young Investors Society
Founder & President

Letter from YIS Chief Operating Officer, Christine Tobin



I am very proud to say that 2021 has been a year full of amazing progress and growth. The momentum and growth we achieved in 2020 and a strong strategic focus has allowed us to continue flourish and thrive in an unpredictable 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 2020, YIS Executive Board made the difficult decision to cancel in-person stock pitch and fundraising events. We continued to host 100% of our events in an online format to continue to serve our YIS students. 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 added a 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 Dollar-A-Day Scholarship Drive in lieu of an in-person gala event to support our Dollar-A-Day Challenge Scholarships and Access Initiative and were amazed at the generosity and support from our YIS Boards and donors.

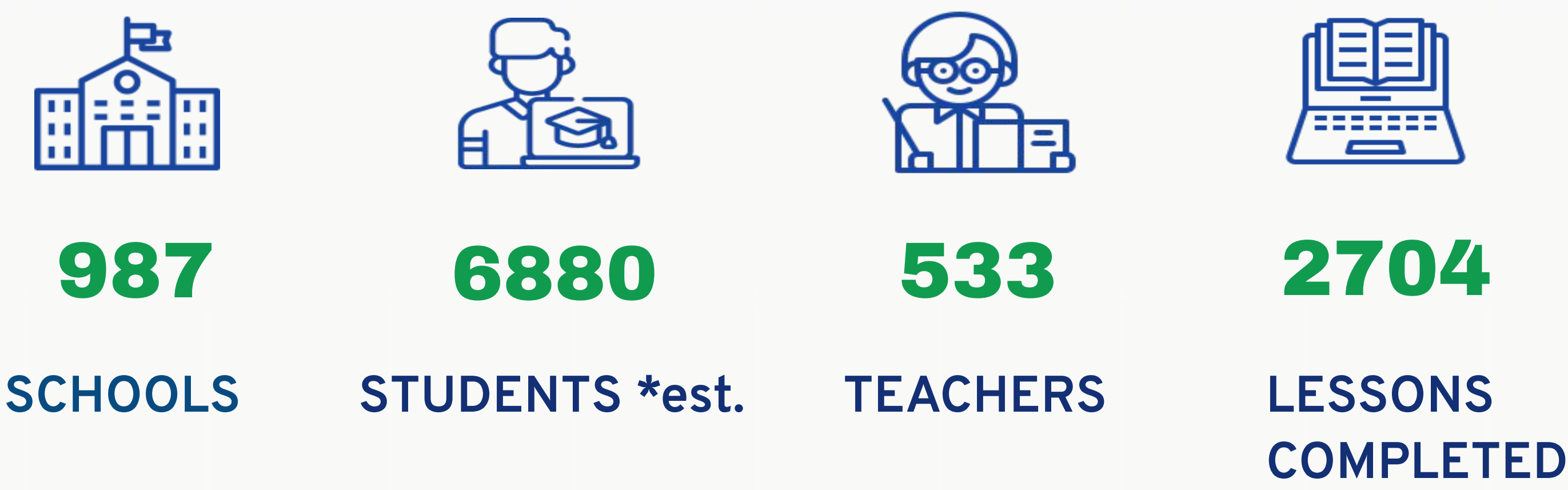
One of the important commitments we are making as we move into the future is the expansion of our Access Initiative. Over the past three years, we have continued to expand into underserved areas to provide access to quality financial literacy curriculum. We have partnered with other non-profit organizations to strengthen our impact in these underserved communities and hope to continue to grow and expand the program.

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

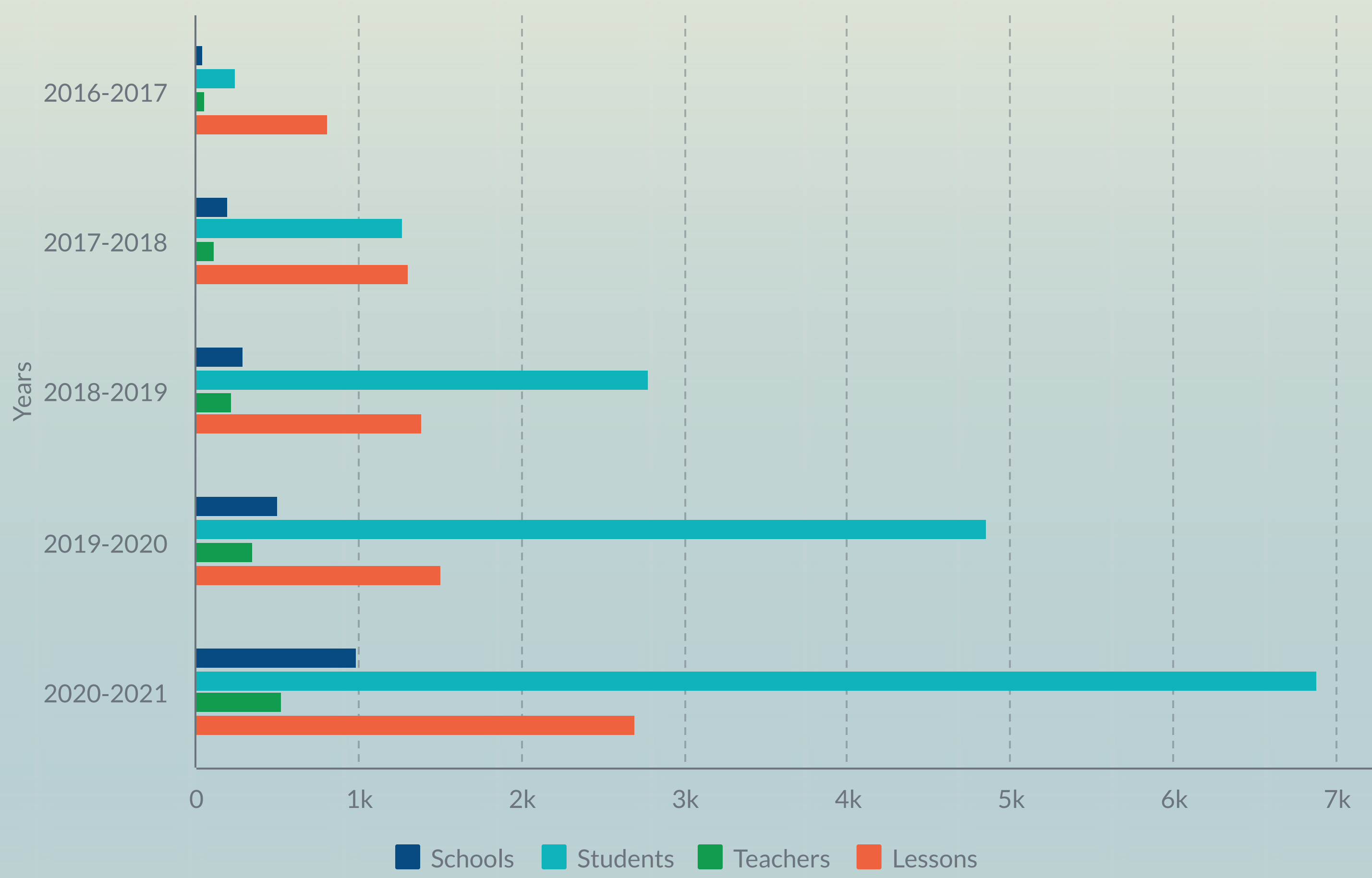
THE WORK THAT WE DO

MEMBERSHIP IMPACT

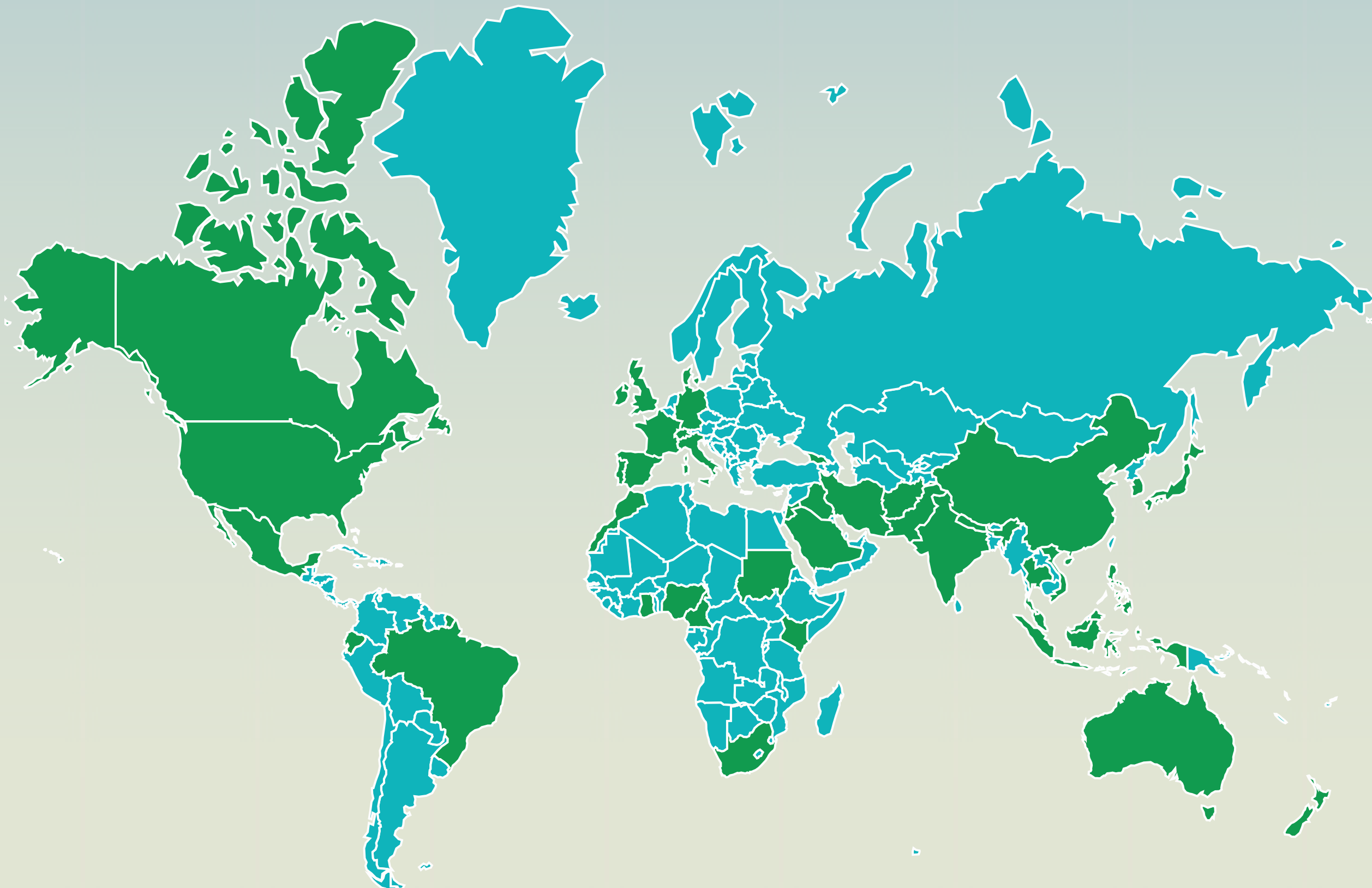


*Estimated students includes students that use our curriculum in the classroom and students that have attended YIS events.

Membership Metrics



YIS SCHOOLS ACROSS THE WORLD



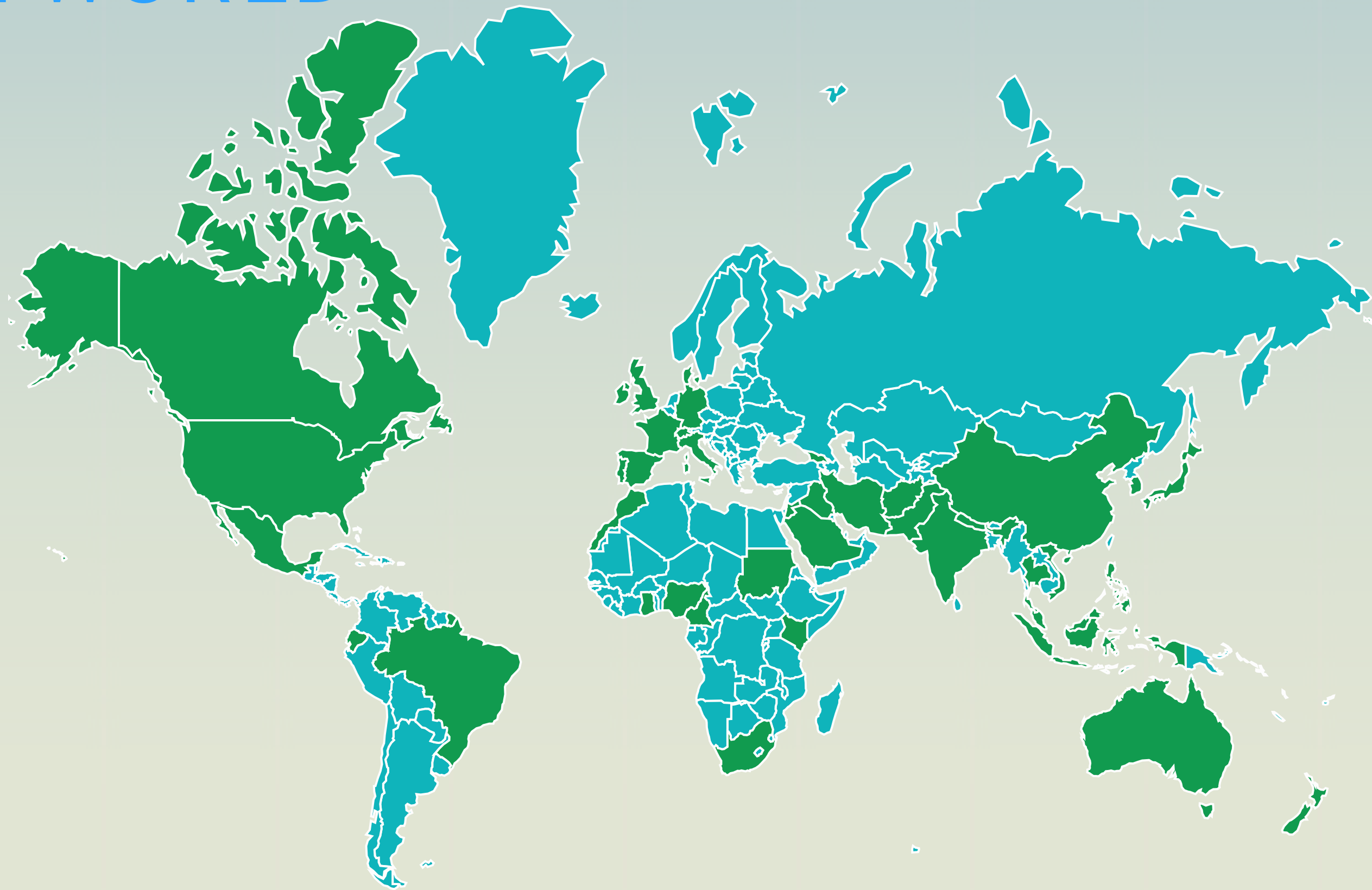
43 U.S. States

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

22 Countries

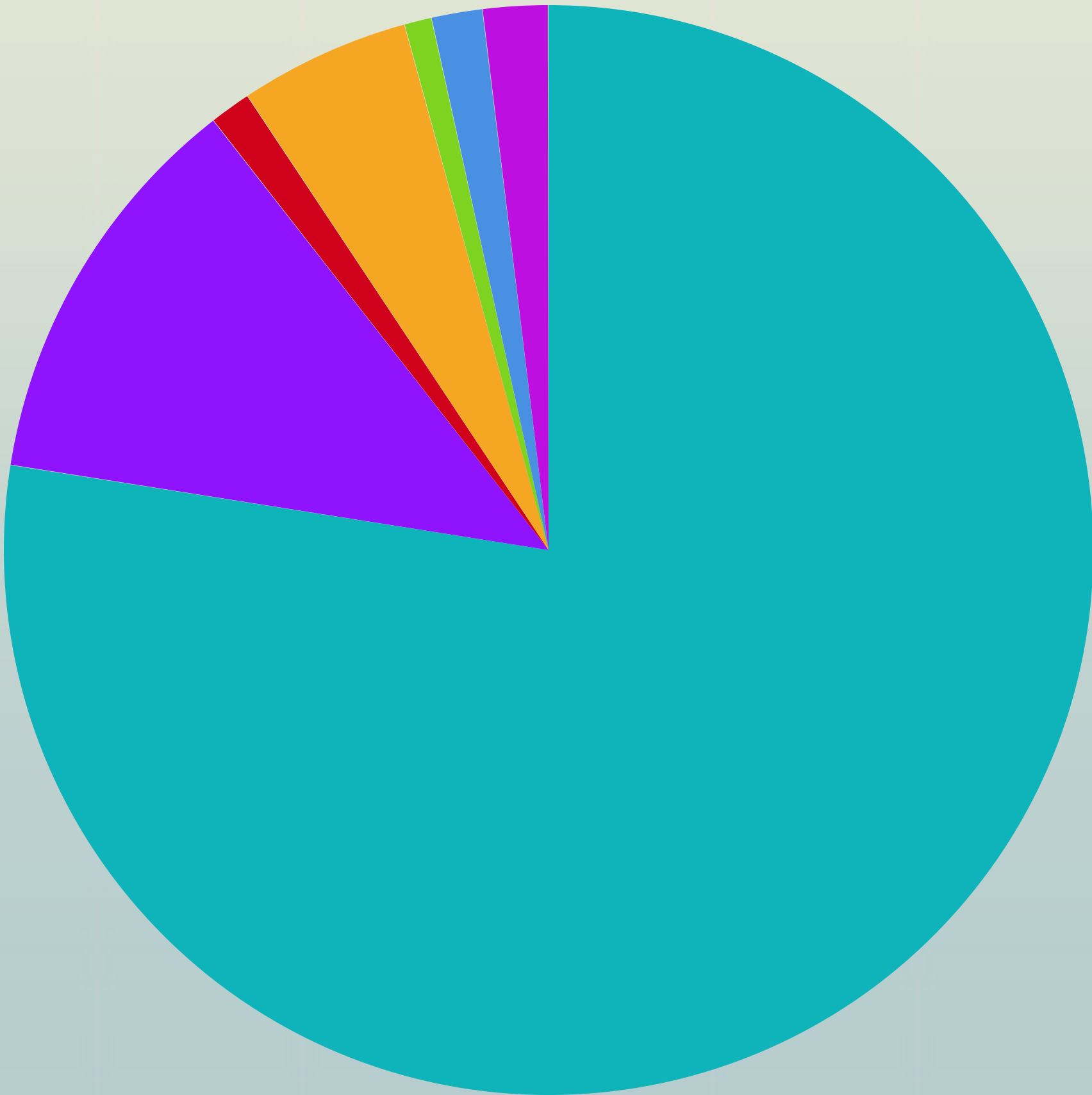
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| United States |
| Hong Kong |
| Singapore |
| South Korea |
| Japan |
| Malaysia |
| Thailand |
| Philippines |
| Pakistan |
| Indonesia |
| Mexico |
| Canada |
| India |
| Ghana |
| Nigeria |
| Denmark |
| Germany |
| Nepal |
| Switzerland |
| United Kingdom |
| Australia |
| New Zealand |

YIS SCHOOLS ACROSS THE WORLD



Number of Schools

United States: 765
Asia: 118
Europe: 50
Canada: 19
Latin America: 12
Africa: 15
Middle East: 8



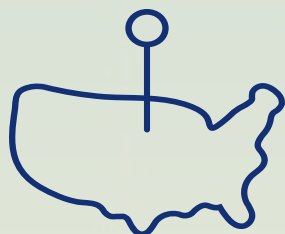
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|------------------------|---------------------|-----------------------|
| United States (77.51%) | Asia (11.96%) | Latin America (1.22%) |
| Europe (5.07%) | Middle East (0.81%) | Africa (1.52%) |
| Canada (1.93%) | | |

YIS ACCESS INITIATIVE



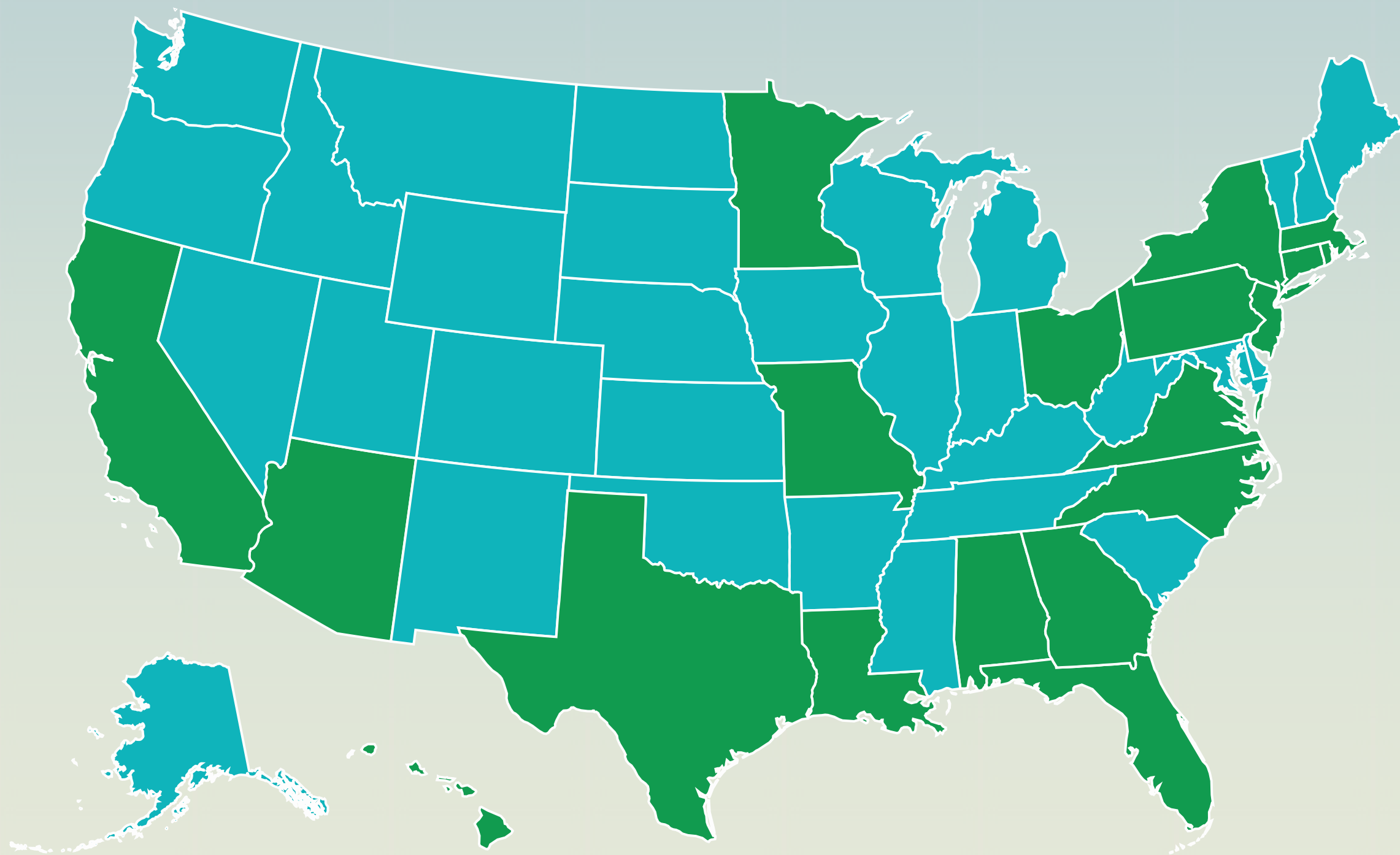
113

SCHOOLS



19

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

221



DOLLAR-A-DAY
CHALLENGE

202



DOLLAR-A-DAY
SCHOLARSHIPS

100



MONEY SKILLZ
BOOTCAMP

238



STOCK PITCH
COMPETITION

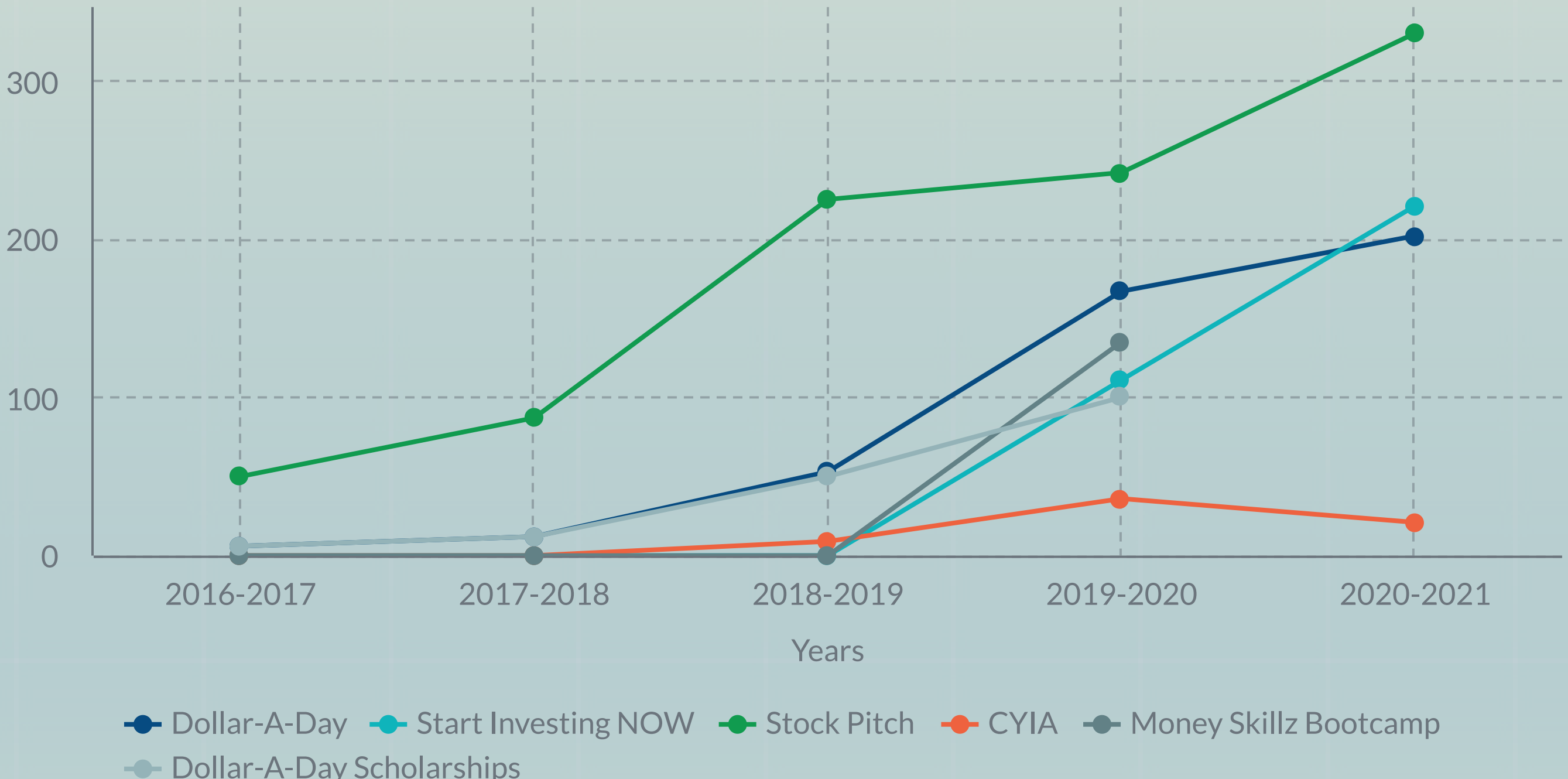
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CYIA
DESIGNATION

21

Program Metrics



2020-2021 Program Highlights



Shark Tank Contest Interview with
Daymond John



Giving Tuesday



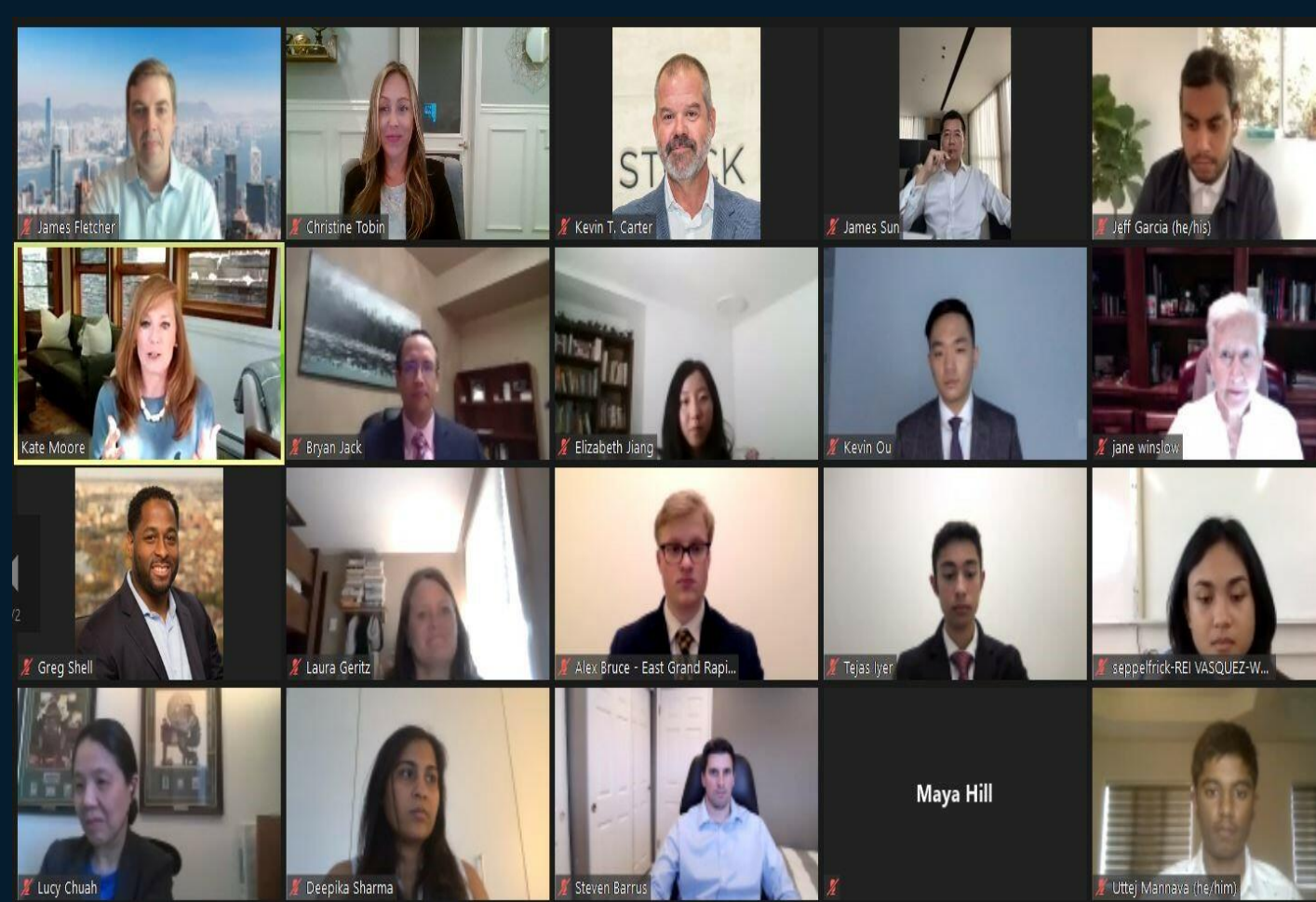
Global
Investment Symposium



YIS Access Initiative



Dollar-A-Day Challenge



YIS Global Stock Pitch Competition

2020-2021 Outstanding Teacher Awards



Saket Shroff: Youth CEO Academy, California

Diana Seppelfrick: Waianae High School, Hawaii

Mark Van Cott: International School of Kuala Lumpur, Malaysia

Rhys Thomas: Renaissance College, Hong Kong

Deng Sam: YIS New York

Kathy Marshall: Tolland High School, Connecticut

Aaron Randolph: Carolina Youth Coalition

Marcy Reyes: The FLY Initiative, Rhode Island

Dana Johnson: BASIS Scottsdale Charter School, Arizona

Joshua Levine: New Utrecht High School, New York

Wei Wang: Gateway Academy, California

William Anderson: Sussex County Technical School, New Jersey

Jennifer Striker: William Mason High School, OH

Mike Zisa: Pennsbury High School, Pennsylvania

Nick Murja: Palo Duro High School, Texas

2020-2021 Corporate Sponsors



CFA Institute



J.P.Morgan



INVESTOR'S BUSINESS DAILY®

2020-2021 Partners



投資者及理財教育委員會
Investor and Financial
Education Council



RoundPier



Thank You For Your Support

Nathan T. Scottsdale, Arizona

"Thank you for providing students all over the nation with the ability to learn about investing. I can't wait to continue to invest in the future!"



Lauryn W. Westlake, CA

"YIS is an amazing organization. My high school experience would not have been the same without it. Thank you for believing in the next generation of investors."

Ellie S. American Fork, Utah

"Investing would have never crossed my mind in high school if not for YIS. With it, and the Dollar-a-Day challenge, now I feel like I'm getting a head start on my future. It's a very rewarding feeling!"



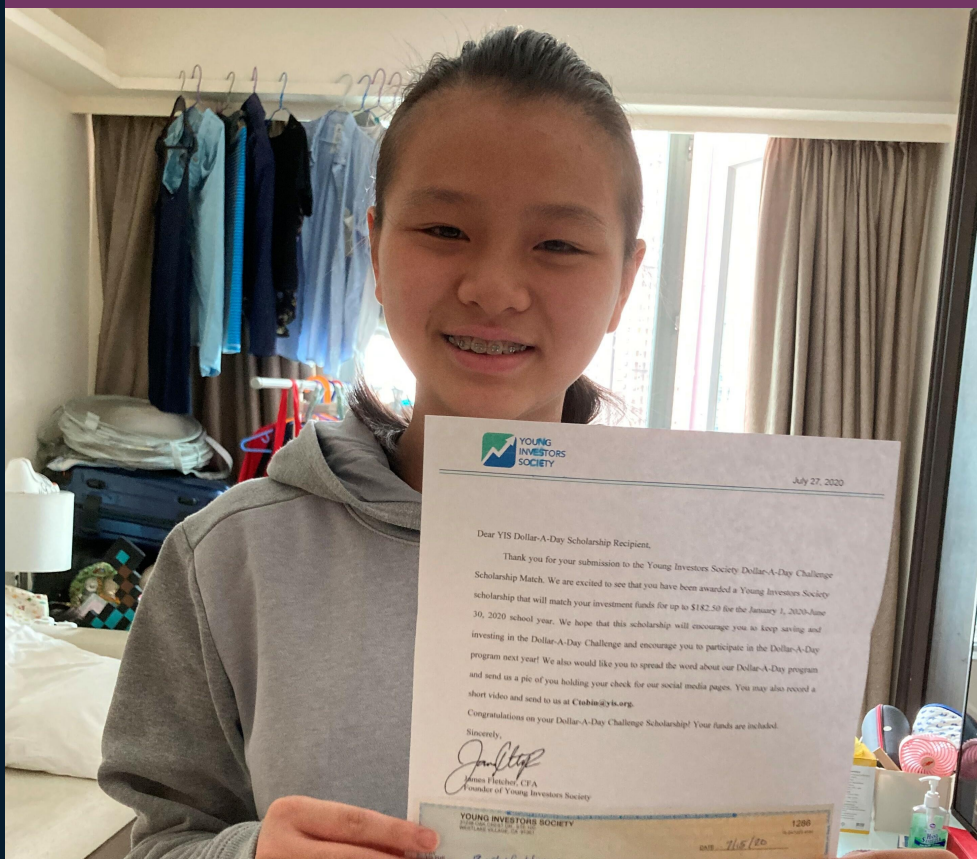
Rachel H. Hong Kong

"I'm so thankful to YIS for providing me with the tools to invest in my future. I'm excited to participate in more YIS programs."



Tejas I, Michigan

"YIS has benefited me as an individual and every member of my team. We now have an understanding of value investing that will last us a lifetime."



Christian G. Oxnard, CA

"Young Investors Society has not only provided me with a second family consisting of extravagantly experienced professionals and students but also has led to my ability to provide for my primary family."



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Westlake Village, CA. 91361
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www.YIS.org

