



SEPT 2022 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

10,000 LESSONS COMPLETED!

Another major Milestone

Last year at this time, YIS reached the milestone of 1,000 schools, and this year we reached a new milestone of surpassing 10,000 total lessons completed! This means 10,000 times that students and clubs or individuals have met, downloaded the Prezi and learned a topic over 45 minutes. It's a tremendous achievement and shows how much our impact continues to expand worldwide.

The milestone reminds me of a conversation I had recently with Christian Gomez. Many of you will remember Christian, but for those that don't know his story, it's an amazing one. He came from a low-income background in Southern California and



PICTURED: CHRISTIAN GOMEZ

learned about the stock market from a book his brother gave him about the markets. He began investing on his own, and then heard about Young Investors Society. When he was applying for high-schools in the school selection process, he specifically chose Westlake High School in California because it offered a YIS club and a chance to expand his knowledge of the financial markets.

He recounted to me "When I entered Westlake High, I was overwhelmed. It was an affluent community where other students could afford tutors. They didn't have to worry about putting food on the table. It was a whole world that I wasn't used to. I didn't know if I would have a place there, but YIS became my home. The students welcomed me in with open arms and we all shared interests of finance and the stock market. I began to gain confidence and traction at school. Looking back, a lot of the credit of me getting into college goes to YIS and my

ONGOING PROJECTS

Dollar-a-Day Matches:

We sponsored 120 kids during the 2021-2022 school year, and target to sponsor 120 in 2022-2023, along with 12 "Start Investing Now" sponsorships. Stockpile is the sponsor of this year's "Start Investing Now" sponsorships.

Program Development:

- Development of the Advanced Curriculum, with the first batch ready by Fall 2022.

Global Stock Pitch

Competition:

- Global Stock Pitch Finals to be held in Salt Lake City, Utah at University of Utah May 11th & 12th.

March 31, 2022

fellow club members. Young Investors Society was really my home during that time."

Christian went on the compete successfully at the state and global YIS stock pitch competitions, and become the President of the YIS Student Advisory Board in 2020. He is currently transferring from Cal Lutheran to USC where he will study finance and has a bright career ahead of him!

It is great reminder of the impact of what a club meeting can have, as we reach the milestone of 10,000 lessons completed.

School Growth

As we begin the new school year, we are pleased to have added an additional 100 new schools this quarter, with 12 of the new schools being Access Schools, to reach **1,465 total YIS schools**. We continue to add about 100 new schools per quarter, completed 434 lessons and added 461 new YIS students this quarter.



YIS CLUB AT SPRINGVILLE HIGH, UTAH

FY2023 Initiatives and Goals

Our annual Board Onsite meeting in July was an amazing and productive time to be together in Hilton Head, SC (thanks Jane for hosting everyone!). A lot of good ideas came out of the sessions. Here are some of the main initiatives that came out of the Onsite:

- Taking the Global Stock Pitch Competition to the next level with more kids, more onsite competitions, and going straight from State to Global level to include more participants.
- Streamlining Regional Advisory Board & Volunteer participation by having an online sign up for specific tasks and having buy-in with each board member contributing \$365/year.
- Making a fundraising push for corporate sponsors, including road shows by me and targeted corporate sponsorships.

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 **1,700 schools** (250 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.

Partnership with GSI

YIS is excited this year to partner with Global Securities Institute (GSI) to provide free access to YIS students to take courses and achieve designations. Participants have the option to complete the Chartered Value Investor (CVI™) the Alternative Investment Manager (AIM™) the Sustainable Investment Analyst (SIA™) and the Chartered Cryptocurrency Analyst (CCA™) and be recognized graduates of the Investment Analyst Program (IAP™). We're grateful to GSI for sponsoring Young Investors Society students by offering these designations completely FREE to YIS students.

We've also reached a promotion with Morningstar where new students get 90% discount on stock research tools, which is a great resource for our students preparing their stock pitch reports.

Board Awards & New Members

We are proud to recognize the YIS Board Member of the year in 2022, Bryan Jack and Fundraiser of the Year, Tyler

Glauser. Their dedication to Young Investors Society and its mission is truly remarkable!

We are also happy to welcome new general board



BRYAN JACK & TYLER GLAUSER

“LOOKING BACK, A LOT OF THE CREDIT OF ME GETTING INTO COLLEGE GOES TO YIS AND MY FELLOW CLUB MEMBERS. YOUNG INVESTORS SOCIETY WAS REALLY MY HOME DURING THAT TIME.”

(CHRISTIAN GOMEZ, YIS STUDENT)

board of YIS.

Conclusion

We're looking forward to another great year at Young Investors Society, and we are already off to a great start. I am really excited to see the Global Stock Pitch Event expand, for the new Advanced Lessons and GSI Certificates, and for extending the reach in the Access Initiative across the world.

Reaching 10,000 lessons completed was a real milestone this quarter. Thinking of the impact on all the kids, like

members this year, John Bowman and Perry Ho. Both have served faithfully and had great impact on their regional advisory boards and we are grateful for their promotion into the general

Christian Gomez, is why we give our time to the cause and seek to grow Young Investors Society.

Looking forward to another great school year!

James

YOUNG INVESTOR SNAPSHOT

Jian M. (Dulwich College, Singapore)

Jian is a passionate Korean entrepreneur deeply intrigued by Financial Markets and Current Affairs. As the Founder of his school's YIS Investing Club and the creator of his own 30-hour Basic Finance Course, LearnGenZ.



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.