



# DEC 2022 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

## EVERYONE'S AN INVESTOR

### Highlights from the Online MasterClass

This quarter I had the opportunity to teach an 8-week "Investing Masterclass" to 30 YIS students. We had students tuning in each week from UK, India, Hong Kong, and across the United States. It was a thrill for me to interact directly with the kids and get to know our YIS students better. I came away from the experience so impressed by this rising generation!

Lily Tun Brown, a senior from California who is interested in pursuing a career in politics was one of the participants. She wrote me afterwards and said

*"YIS has literally changed my life! It's a place where students feel appreciated and understood on their journeys towards college, careers, and beyond. In the age of social media and conformity, it's important that young people understand the importance of 'being yourself' and following your passions, regardless of how unconventional."*

I loved this quote because it

shows that YIS is a great program for anyone. Researching stocks is leaning about different industries and sectors, and through YIS students learn great leadership and business skills. Truly, in the end, "everyone is an investor".

I'm grateful that YIS prepares students for careers in finance, but I'm also thrilled when we prepare future politicians, entrepreneurs, engineers and global leaders, like Lily.

### School Growth

This quarter, we added **87 new schools** and 380 new registered students to reach a total of 1,533 schools, crossing the 1,500 school milestone! We saw especially strong growth in



Pictured: Lily Tun Brown

## ONGOING PROJECTS

### Dollar-a-Day Matches:

We sponsored 50 kids during Fall, and target to sponsor 120 in 2022-2023 (20 Access Initiative), along with 12 "Start Investing Now" sponsorships. Stockpile is the sponsor of this year's "Start Investing Now" sponsorships.

### Program Development:

- Continued Rollout of Advanced Lesson Plans, with Advanced Financial Analysis launched in January
- Getting bids for revamp of the website and MyYIS portal.
- YIS Endowment

### Global Stock Pitch

#### Competition:

- To be held this year in Salt Lake City, Utah on May 11 & 12

new schools from India, New York, California, and added our first new schools in Tennessee, Montana, Poland and Zambia. YIS is now active in 71 countries around the world! Access Schools reached 186 accounting for 17% of total students.

### Dollar a Day Matches

One of the highlights of the 2<sup>nd</sup> quarter each year for YIS is to announce the winners of the first round of Dollar-a-Day sponsorships. This year we had 187 Fall Applicants and we awarded 50 students with the \$365 sponsorship.

The essay question was "What would you like your financial life to look like in 10 years?" We received many tremendous answers, and it is great to see the students be so thoughtful about their future. We also offered schools an incentive that if five students submitted an essay from one school, they would enter a raffle to receive a pizza party. Four schools received the prize: Diamond Bar High School in California, Basis Scottsdale in Arizona, Cox Mill High School in North Carolina and ISKL in Malaysia. We will sponsor 120 applicants this year, 50 in the Fall and 70 in the Spring.

### Expanding the Global Stock Pitch Competition

One of the exciting developments that we're looking forward to this year is expanding the reach of the Global Stock Pitch Competition. It is always such a life-changing experience for the kids and their parents, so we want to offer this experience to more YIS kids.

As a result, this year at the 2023 Global Stock Pitch Competition on May 11 & 12, we are offering an Onsite Case Study Competition which will be open to all YIS students who want to fly out, expanded workshops, we will conduct semi-finals in person rather than over Zoom, and will be offering more paid internships and prizes. All with the purpose of getting more kids there in person at our flagship event. The vision is that we could grow to offer a major in-person event, like the High School Robotics Competition or DECA's ICDC Competition, which attracts thousands of kids each year and significant corporate sponsorships. Below is a picture that Dave Miles took at the 2022 High School Robotics competition. How amazing would it be for YIS to build to that level in the future!

### Fundraising

This quarter, we raised \$91,000 as we held our annual 25 days of Giving Campaign and Giving Tuesday. I want to sincerely thank all those that donated, we had two generous donors that matched donations up to \$25,000 each. We also had 100% board participation, which is such a great sign for grants and corporate sponsorships to see how supportive our General Board and Advisory Board is. It was our biggest Giving Campaign yet and I am so grateful to each of you from the bottom of my heart.

We are also happy to announce new exciting corporate sponsorship opportunities, where we are offering companies the chance to be multi-year Corporate Champions. There are 6 Multi-Year Champion Sponsor Spots available: 3 for the Dollar a Day Program and 3 for the YIS Access Initiative. We are happy to announce that we have already



Pictured: 2022 High School Robotics Competition

reserved the first Access Initiative spot for **Grandeur Peak Global Advisors** who will be making a \$53,000 donation in January. We are in the process of setting up fundraising road shows to pitch in person with corporations. The first meetings are set up in New York City for January 30 and 31.

“YIS IS A PLACE WHERE STUDENTS FEEL APPRECIATED AND UNDERSTOOD ON THEIR JOURNEYS TOWARDS COLLEGE, CAREERS, AND BEYOND....”

(LILY TUN BROWN, CALIFORNIA)

funding for the organization, and also would provide YIS students an opportunity to gain hands-on investment management

experience.

### Board of Directors

We are pleased to announce that **Perry Ho** will join the Executive Board of YIS as Secretary. We are grateful for Perry's years of

support of YIS, and for his willingness to serve.

### 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, Fundraising, and the expansion of the Global Stock Pitch Competition.

YIS is preparing kids for all types of careers and success in the future. I believe that "everyone is an investor". Whether

they are investing professionally or personally, these are skills that will last a lifetime.

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

Investors can change the world!  
James

### YOUNG INVESTOR SNAPSHOT

**Taylor L** (United World Collge, Singapore)



Taylor is a sophomore at United World College in Singapore where he is studying Economics in the IGCSE program. Taylor has participated in the YIS Dollar-A-Day Challenge, Stock Pitch Competition, and has recently earned the CYIA designation. Congratulations, Taylor!



Pictured: Basis Independent Silicon Valley, CA

### 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.