



YOUNG
INVESTORS
SOCIETY



Young Investors Society
Annual Report
2022-2023

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

Vice President
Senior Vice President
Merrill Lynch (Retired)

Patricia Ball

Secretary
Investment Counselor
Fisher Investments

Perry Ho

Executive Board Member
Management Professional

Lee Mackay

Partner at Nevers, Palazzo, Packard,
Wildermuth & Wynner

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

Andrew Davis

Independent Financial Advisor
WealthSource Partners

Mark Van Cott

YIS Advisor at International School
of Kuala Lumpur, Malaysia

Christine Tobin

Chief Operating Officer
Young Investors Society

Board Members

John Bowman

Executive Vice President
CAIA Association

Bryan Jack

Chief Financial Officer
First Community Bank-Utah

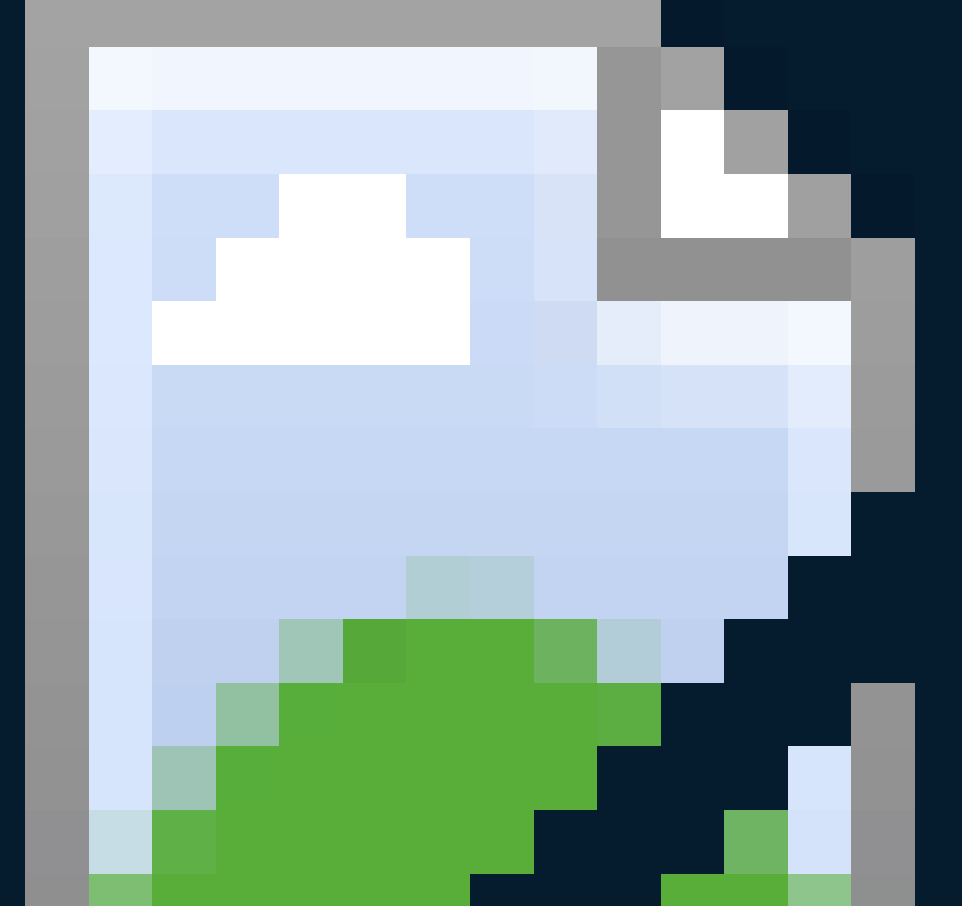
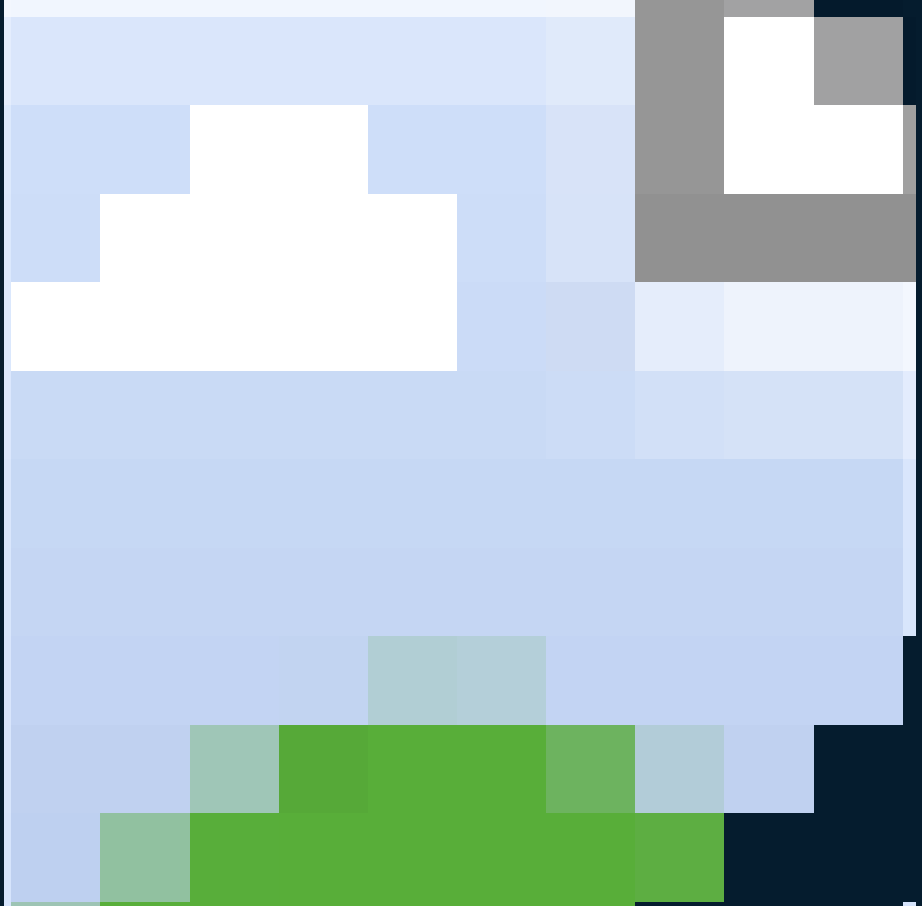
Steve Barrus

Financial Consultant
Advisory Group For Life

Vielcka Mansukhani

Head of Equity Sales/ LATAM
Institutional Equity Sales at Bradesco

Student Advisory Board



Elected Officers

President: Cici Y: The Pennington School, NJ

West Coast VP: Shant K: La Canada High School, CA

East Coast VP: Luke F: American Heritage, FL

Mid-West VP: Thomas H: Brophy College Prep, AZ

Asia VP: Jasper L: Renaissance College, HK

International VP: Brian F: Toronto French School, Canada

Secretary: Micah S: Newbury Park High School, CA

Student Director of Communication: Stephen S: American Heritage, FL

Members-At-Large

West Coast

Felix P: Diamond Bar High School, CA
Christiana S: Mount Everest Academy, CA
William C: Saratoga High School, CA
Rohit V: Basis Silicon Valley, CA
Sean D: Irvington High School, CA
Ronan M: Mountain View Academy, WA

Mid-West

Zack O: Mountain High School, AZ
Janvi S: Basis Scottsdale, AZ
Mehul S: Chaparral High School, AZ
Fatimah A: Basis Scottsdale, AZ
Humayl A: Basis Scottsdale, AZ
Sujay K: Basis Scottsdale, AZ
Ishaan S: Jordan High School, TX
Brennan L: Plano West High School, TX
Raghav S: Clements High School, TX
Arnav S: Heritage High School, TX
Dillan P: Coppell High School, TX
Umahi A: San Jacinto College, TX
Larsen B: Springville High School, UT
Manar L: Vanderbilt University, TN

East Coast

Stephen S: American Heritage Plantation, FL
Vyom M: American Heritage Plantation, FL
Devin S: American Heritage Plantation, FL
Sebastian S: American Heritage Plantation, FL
Ryan A: Cox Mill High School, NC
Everett P: Cox Mill High School, NC
Jaylin P: Charles R. Drew High School, GA
David C: Council Rock South, PA
Abigale L: Tolland High School, CT
Patrick C: Tolland High School, CT
Patrick F: Oratory Prep. NJ
Ekam B: Montgomery High School, NJ

International

Samanyu D: Private International English School, UAE
Manual G: Kings College Soto de Viñuelas, Europe
Niranjen S: Blossom Public School, India
Soham A: NES International School, India
Vaibhav B: The Brigade School, India
Vandita K: Neerja Modi School, India
Jian M: Dulwich College, Singapore
Reuben L: Raffles Institution, Singapore
Yoojeong L: Branksome Hall, South Korea

Letter from YIS Founder & President, James Fletcher, CFA



Young Investors Society achieved another great year!

It's amazing to look back and see that our program has now grown to 1,825 schools in 75 countries! I'm thrilled to see the snowball continue to grow for high school students across the world.

Many things stand out to me from the accomplishments for YIS this year. One is the expansion of the Global Stock Pitch Competition format. This year, held in Salt Lake City, we were able to more than double the amount of teams that we hosted onsite, and we added more workshops, speakers, and an onsite Case Study Competition. It was huge success, and the kids and parents loved the expanded format. It was also exciting to see teams fly in from all over the world to compete, including teams from Canada, United Kingdom, Colombia, South Korea, and China.

Another achievement of Young Investors Society this year was the continued growth of the Access Initiative program, which serves underserved communities. We grew from 167 to 221 schools, as we continue to expand our Access Partners. This would not be possible without the support of key strategic corporate sponsors that signed up to support the Access Initiative on a multi-year basis, Bloomberg Philanthropies and Gradeur Peak Global Advisors. We are grateful to their ongoing support and belief in the mission of YIS to "Provide Financial Literacy To All".

I am always amazed at every opportunity I have to interact with the amazing YIS kids! This year I had the opportunity to teach an eight week MasterClass and was truly inspired by the kids that participated in the class. Also during the stock pitches, the Investment Symposiums, the CYIA interviews, and all of the many interactions during the year with the YIS kids, I'm continuously reminded that the future is bright and that investors can truly change the world!

Thank you to each of you for the support in helping to grow Young Investors Society. 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 2023 has been the best year yet for Young Investors Society. This year has been full of amazing progress and consistent growth. Young Investors Society has met 100% of the membership and program goals for the year including exceeding our total schools goal as well as Dollar-A-Day Challenge and fundraising goals for the year.

We are beginning to see the impact of our growth with the largest Global Stock Pitch Competition to date as well as an increase in the Access Initiative. We can proudly announce that 20% of our total students are served through the Access Initiative. I can proudly say that we are positioned for a future where every high school student has access to FREE, quality, online financial education.

We started off the year offering an 8-week Investing MasterClass taught by James Fletcher which quickly filled to capacity with 50 eager students. We have had great feedback from the students that they thoroughly enjoyed this course offering.

We successfully held an online Giving Tuesday Fundraising Campaign and the first Change the World 5K Charity Run on the West Coast to support YIS programs. We were also able to secure multi-year corporate sponsorships from Bloomberg Philanthropy and Grandeur Peak to support the Access Initiative. We were amazed at the generosity and support from our YIS Boards and donors as well as local businesses and corporate sponsors.

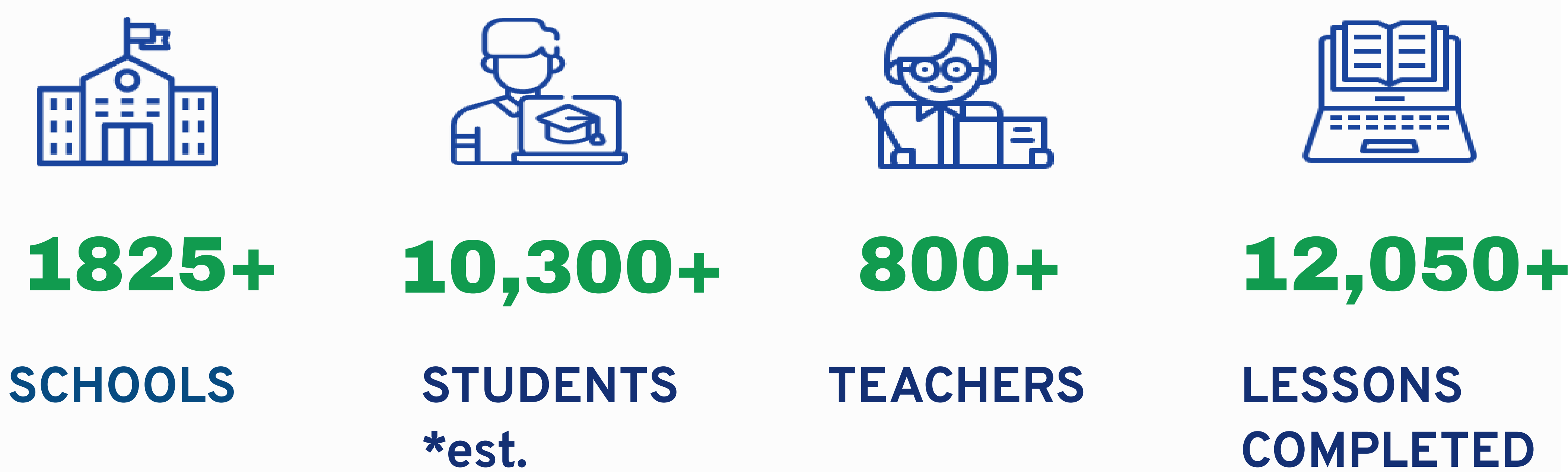
One of the important commitments we are making as we move into the future is the transition and expansion of our website. We are currently working to improve user experience, expand data capture, and transition to a U.S. based platform which allows more control over our content and ability to update information quickly.

This past year has been one of continued growth, commitment, and engagement. 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

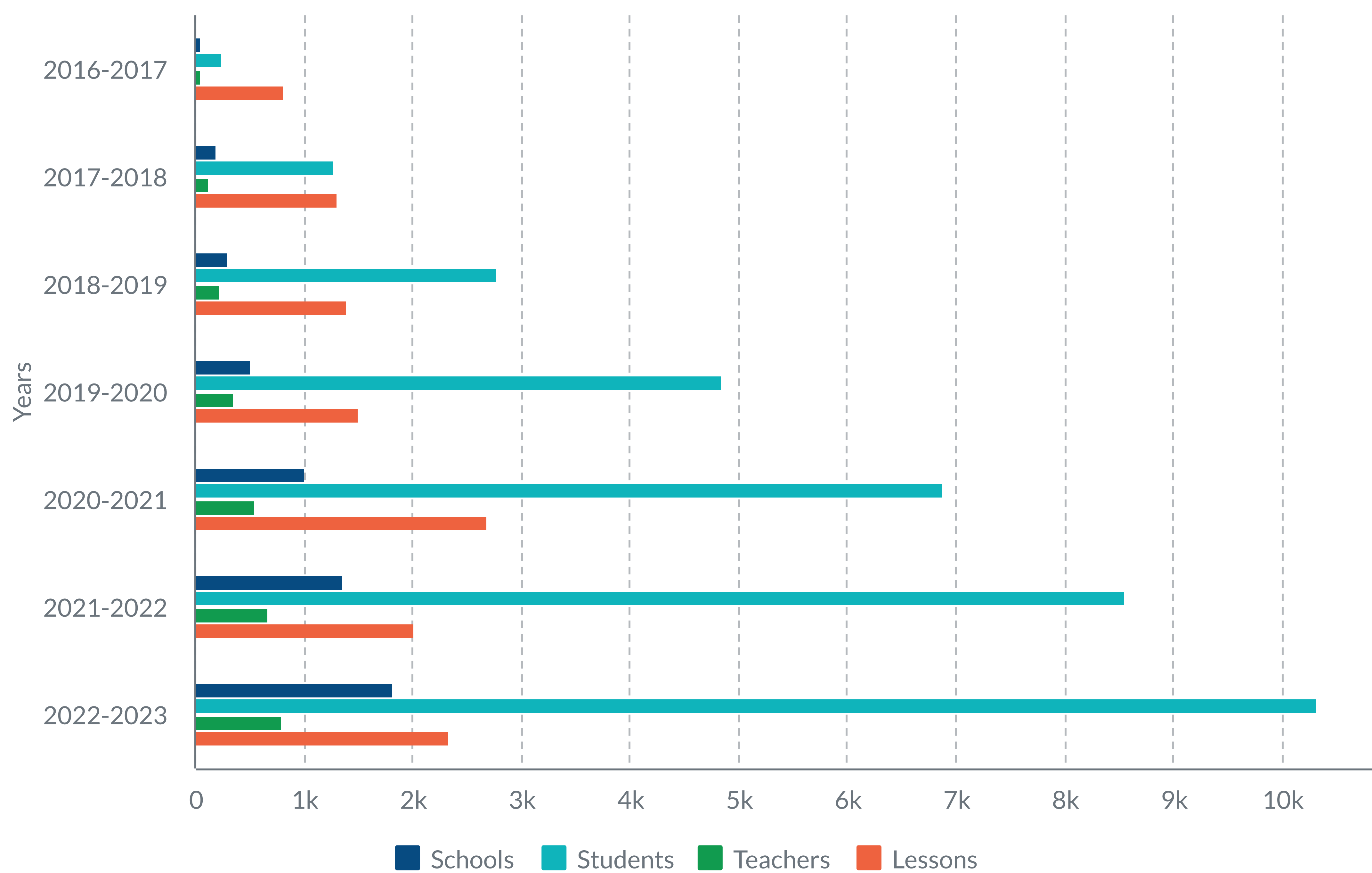
THE WORK THAT WE DO

MEMBERSHIP IMPACT

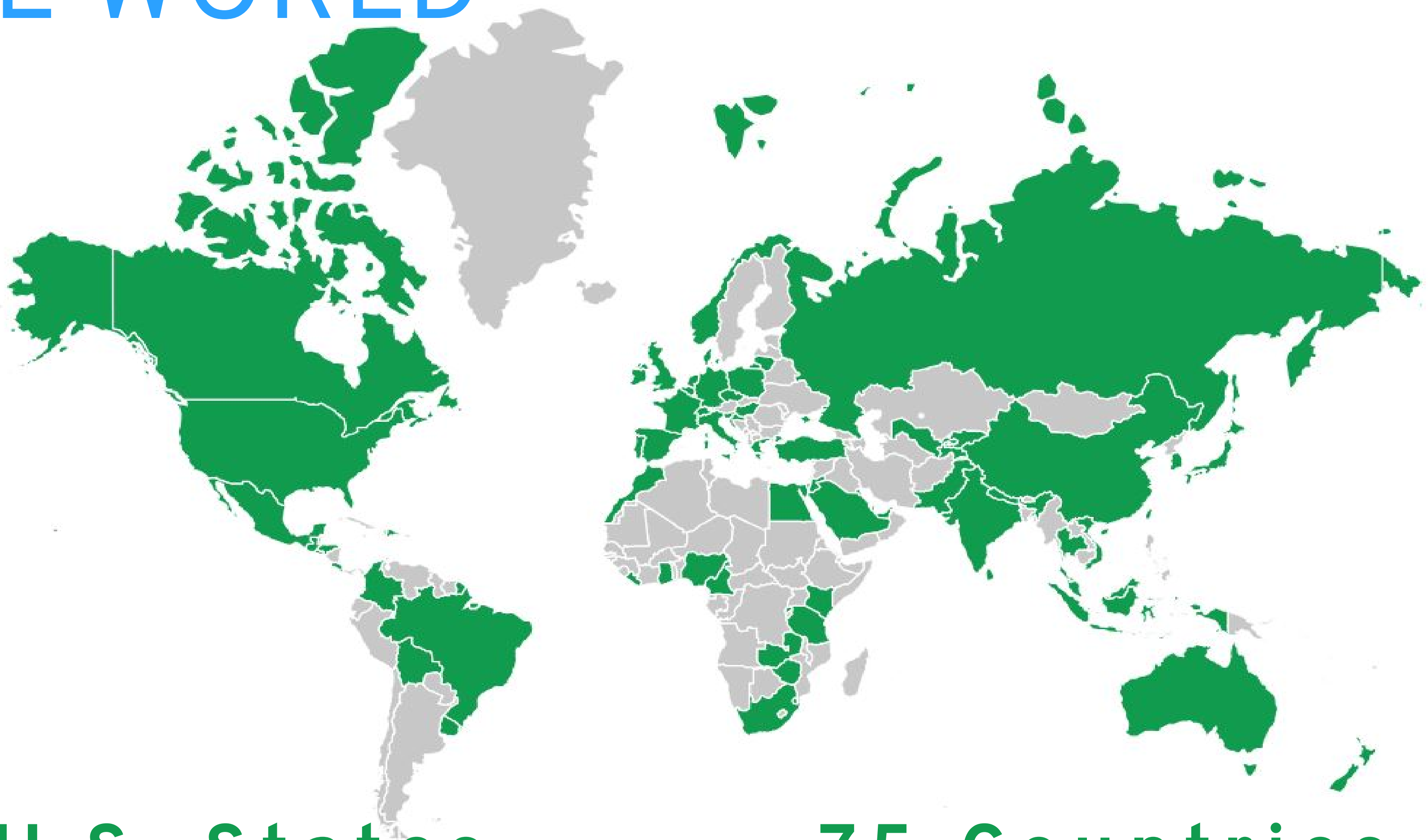


*Estimated students includes students that use our curriculum in the classroom and students that have attended YIS events.

Membership Metrics



YIS SCHOOLS ACROSS THE WORLD



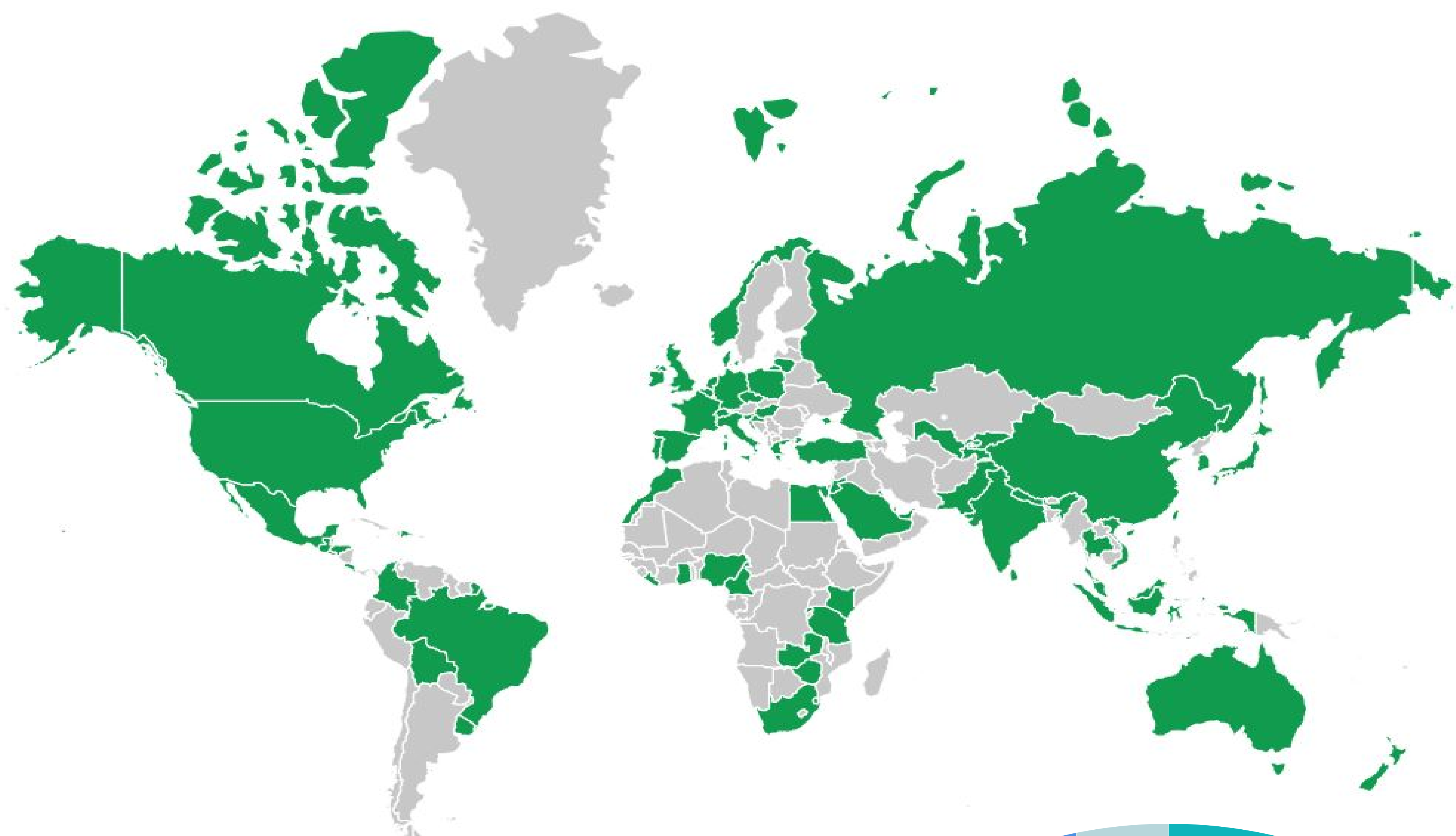
46 U.S. States

75 Countries

- | | |
|---------------|----------------|
| 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 | Tennessee |
| Louisiana | Texas |
| Maine | Utah |
| Maryland | Vermont |
| Massachusetts | Virginia |
| Michigan | Washington |
| Minnesota | Wisconsin |

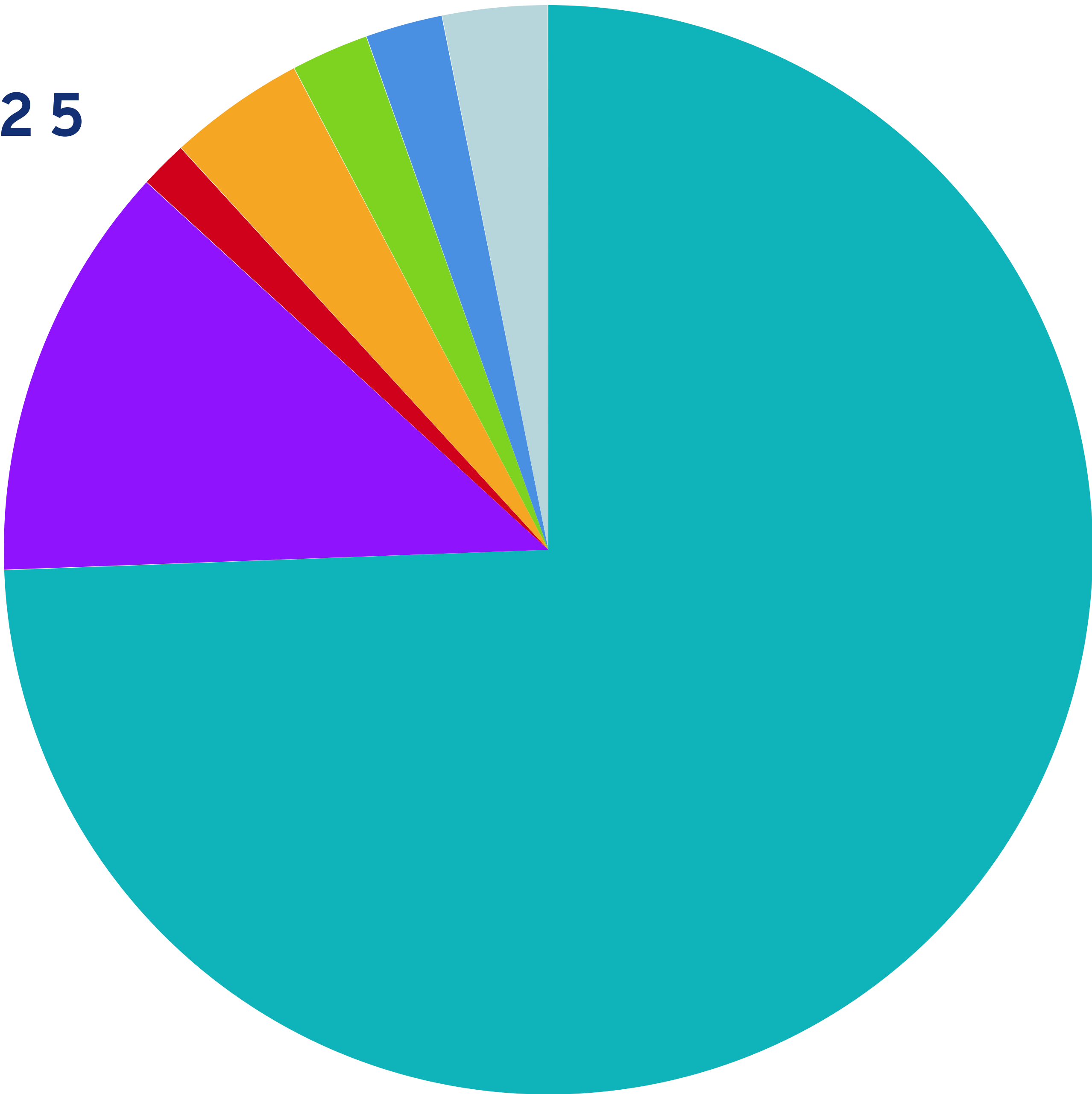
- | | |
|--------------------|-----------------|
| Australia | Indonesia |
| Africa | Ireland |
| Belgium | Israel |
| Bolivia | Italy |
| Brazil | Japan |
| Canada | Jordan |
| China | Kyrgyzstan |
| Colombia | Kuwait |
| Costa Rica | Liberia |
| Croatia | Lithuania |
| Czech Republic | Malaysia |
| Denmark | Mexico |
| Dominican Republic | Morocco |
| Egypt | Nepal |
| El Salvador | Netherlands |
| England | New Zealand |
| Ecuador | Nigeria |
| France | Norway |
| Germany | Pakistan |
| Ghana | Peru |
| Greece | Philippines |
| Guam | Poland |
| Guatemala | Portugal |
| Honduras | Puerto Rico |
| Hong Kong SAR | Qatar |
| Hungary | Russia |
| India | Rwanda |
| | Saudi Arabia |
| | Scotland |
| | Singapore |
| | Slovenia |
| | Somalia |
| | South Africa |
| | South Korea |
| | Spain |
| | Sri Lanka |
| | Switzerland |
| | Taiwan |
| | Tajikistan |
| | Thailand |
| | Trinidad/Tobago |
| | Turkey |
| | UAE |
| | United Kingdom |
| | United States |
| | Uruguay |
| | Vietnam |

YIS SCHOOLS ACROSS THE WORLD



Number of Schools: 1825

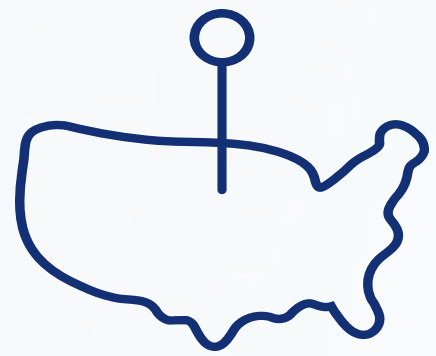
United States: 1358
Asia: 226
Europe: 74
Canada: 57
Middle East: 42
Africa: 42
Latin America: 26



United States (74.41%) Asia (12.38%) Latin America (1.42%)
Europe (4.05%) Middle East (2.3%) Africa (2.3%)
Canada (3.12%)



221+
SCHOOLS

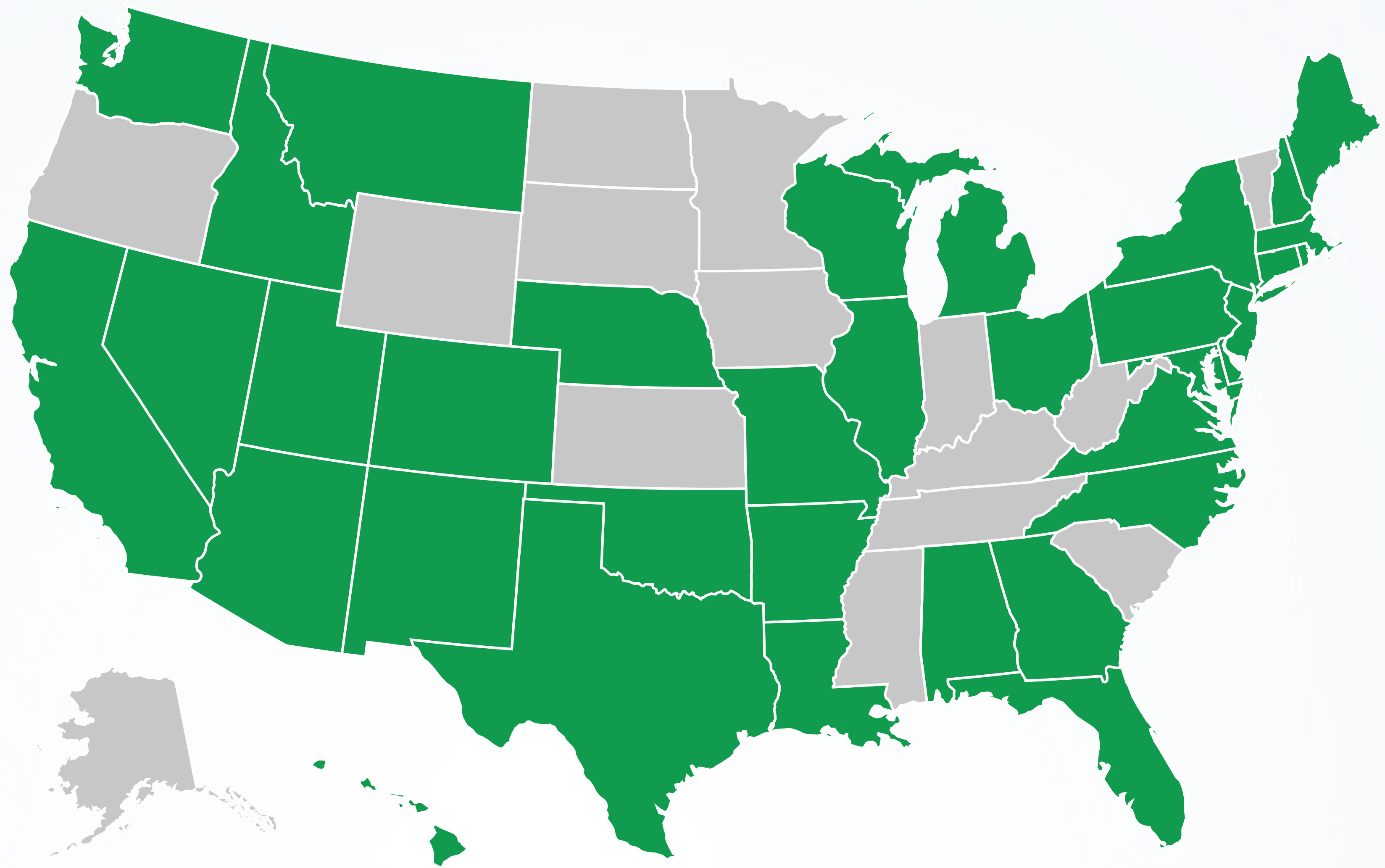


35
STATES



20%
STUDENTS
SERVED

YIS ACCESS INITIATIVE



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.

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.

Objectives:

- Increase access to financial literacy programs to under-resourced communities.
- Expose students to a variety of careers available in financial markets and STEM disciplines via mentorship programs.
- Raise awareness that financial market and STEM opportunities are available to students regardless of gender, race, or socio-economic status.
- Enable students to apply observational, practical, modeling, inquiry, and problem-solving skills in finance related coursework.

THE WORK THAT WE DO

PROGRAM IMPACT



START INVESTING
NOW

217



DOLLAR-A-DAY
CHALLENGE

415



DOLLAR-A-DAY
SCHOLARSHIPS

120



MONEY SKILLZ
BOOTCAMP

252



STOCK PITCH
COMPETITION

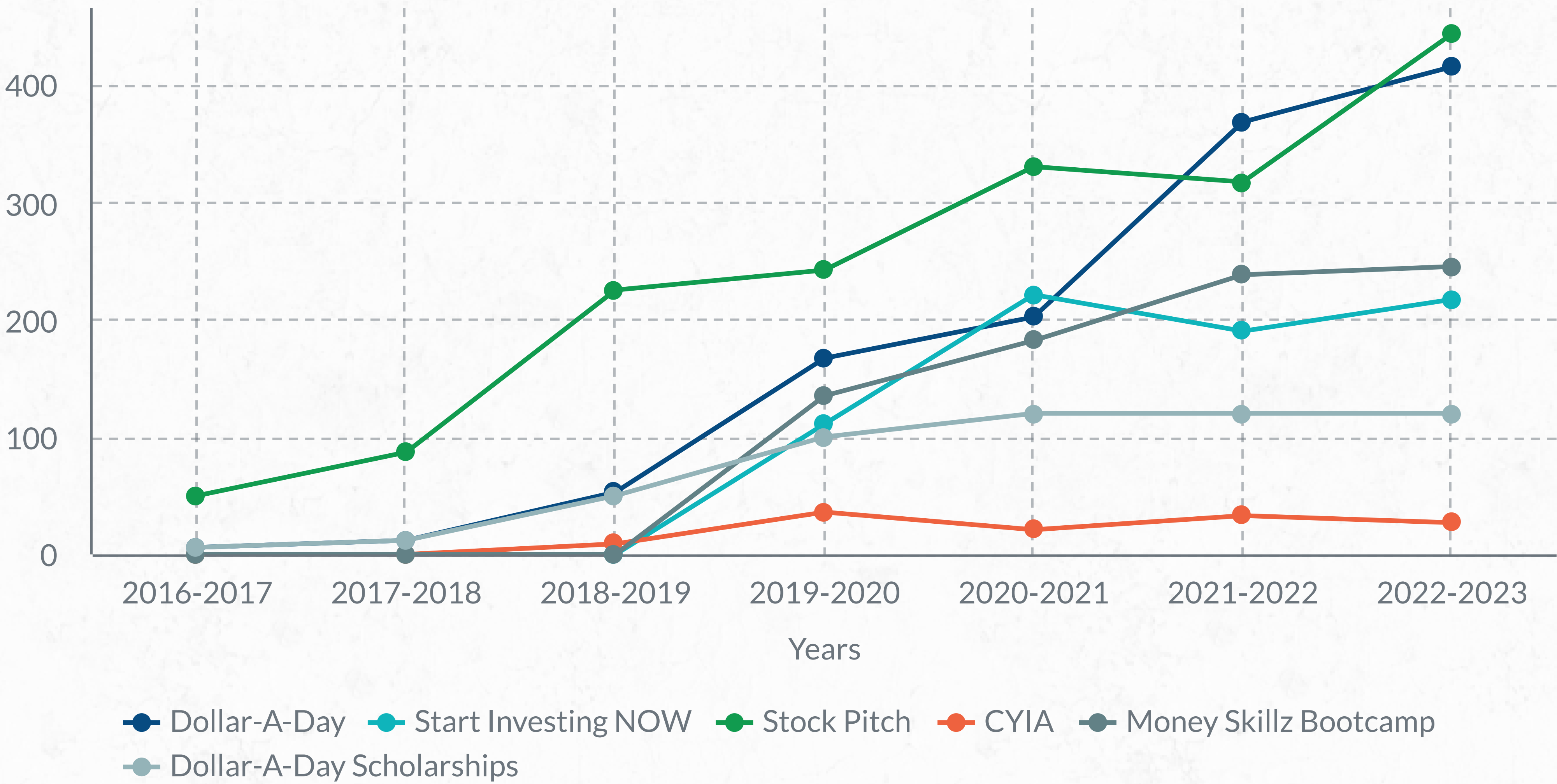
443



CYIA
DESIGNATION

27

Program Metrics



2022-2023 Program Highlights Community Champions



Tolland High School YIS Club exceeds donation contributions for the 3rd year in a row in the YIS Stock the Shelves Food Drive!

In December 2022, the Tolland High School YIS Club joined forces with the THS Student Council and raised over \$500 dollars, providing over 400 “in demand” food items for the Cornerstone Food Pantry in Rockville, CT.

Young Investors Society Master Class

Young Investors Society hosted its first Investing Master Class taught by YIS Founder, James Fletcher to 50 YIS Students.



INVESTING MASTER CLASS

PRESENTED BY:
YIS Founder,
James Fletcher, CFA

Join CIO, James Fletcher in this 8-week Master Class where he will teach numerous investing concepts including: Value Investing, Growth Investing, How to Identify Quality Businesses, How to Size and Trade Positions, and much more!

This exclusive class is open to the first 50 Young Investors Society students to register.

 **OCTOBER 5-
NOVEMBER 23**

WEDNESDAYS
4:00 PM PST/
7:00 PM EST




Founder and Chief Investment
Officer at Ethos Investment
Management

*Participating students will have the chance to have their name featured in James's upcoming book on investing in the acknowledgement section!

*Students must be able to attend the majority of classes!

Registration OPENS September 1st!
<https://yis.org/events/>

Global Investment Symposiums

Young Investors Society held two Investment Symposiums (U.S. and Asia).

Each symposium had professional speakers present on a variety of topics including Investing for Beginners, Blockchain/Cryptocurrency, Alternative Investing, Asset Management, Investment Banking, Careers in Finance, and so much more. YIS featured a Fireside Chat with Ted Seides, Founder of Capital Allocators and Rebecca Sin, Senior EFT Analyst at Bloomberg.



**Global**
INVESTMENT SYMPOSIUM

06 MARCH 2023 | 4:00 PM PST / 7:00 PM EST

Students learn valuable skills in investing for beginners, blockchain/cryptocurrency, alternative investing, asset management and so much more from a variety of finance professionals in this webinar/workshop setting. Finance trivia games between speaker sessions make this event fun and entertaining for all. Students win prizes and have an interactive experience with a Q & A session with event speakers.

INCLUDES
**TED SEIDES, CFA**
Founder of Capital Allocators

FIRESIDE CHAT WITH

CAREER PANEL
IAN WRIGHT
Finance Professor
Brigham Young University
IVANNA HAMPTON
Content Development
Morningstar
DAVID ALLEN, CFA
Institutional Director
Schroders
OLI DALEY
Sales Manager
Bloomberg LP

JOIN US 

SPEAKERS
**VICTOR WANG**
CEO
Stockpile
**BRYAN PERRY**
Vice President
Goldman Sachs
**STACY HAVENER**
Founder
Havener Capital
**BENJAMIN TSAI**
President
Wave Financial

REGISTER BY MARCH 3RD:
[HTTPS://YIS.ORG/EVENTS/](https://yis.org/events/)



**Asia**
INVESTMENT SYMPOSIUM

15 MARCH 2023 | 6:00 PM HK/MY 3:30 PM INDIA

Students learn valuable skills in personal finance, alternative investing, investment banking, technical analysis, risk assesment, algorithmic trading, careers in finance and so much more from a variety of finance professionals in this webinar/workshop setting. Finance trivia games between speaker sessions make this event fun and entertaining for all. Students win prizes and have an interactive experience with a Q & A session with event speakers.

FEATURING
**REBECCA SIN**
Senior ETF Analyst
Bloomberg

REGISTER BY MARCH 10TH
[HTTPS://YIS.ORG/EVENTS/](https://yis.org/events/)

JOIN US 

SPEAKERS
**SANDIPAN ROY**
Director & Head of Products
Credit Suisse
**MALAVIKA SHANKER**
Head of Derivatives
Morgan Stanley
**CATE VAN COTT**
Investment Banking
Summer Analyst
Lazard
**ALMOHANAD ALSAIF**
Certified Financial Technician



Dollar-A-Day Challenge



The YIS Dollar-A-Day Challenge had a total of 415 participants for the Fall & Spring rounds.

Each participant submitted their essay on the following topic:

What would you like your financial life to look like in 10 years?

120 students were selected to receive the Dollar-A-Day FREE Money Match Scholarship for the 2022-2023 school year.

YIS Shark Tank Contest

YIS Students are encouraged to watch the latest season of NBC's Shark Tank.

Students have \$1,000,000 YIS dollars to allocate among their 3 favorite pitches from all participating businesses.

Students Individually analyze their top three companies they would choose to invest in and create a 3-5 minute video or brief write-up describing their allocations.



1st Place: Neil G: Cox Mill High School, NC

2nd Place: Ian H: Basis Chandler Charter School, AZ

3rd Place: Winnie C: Thomas Wootton High School, MD &

Riley B: Springville High School, UT

YIS Global Stock Pitch Workshops & Case Study Competition

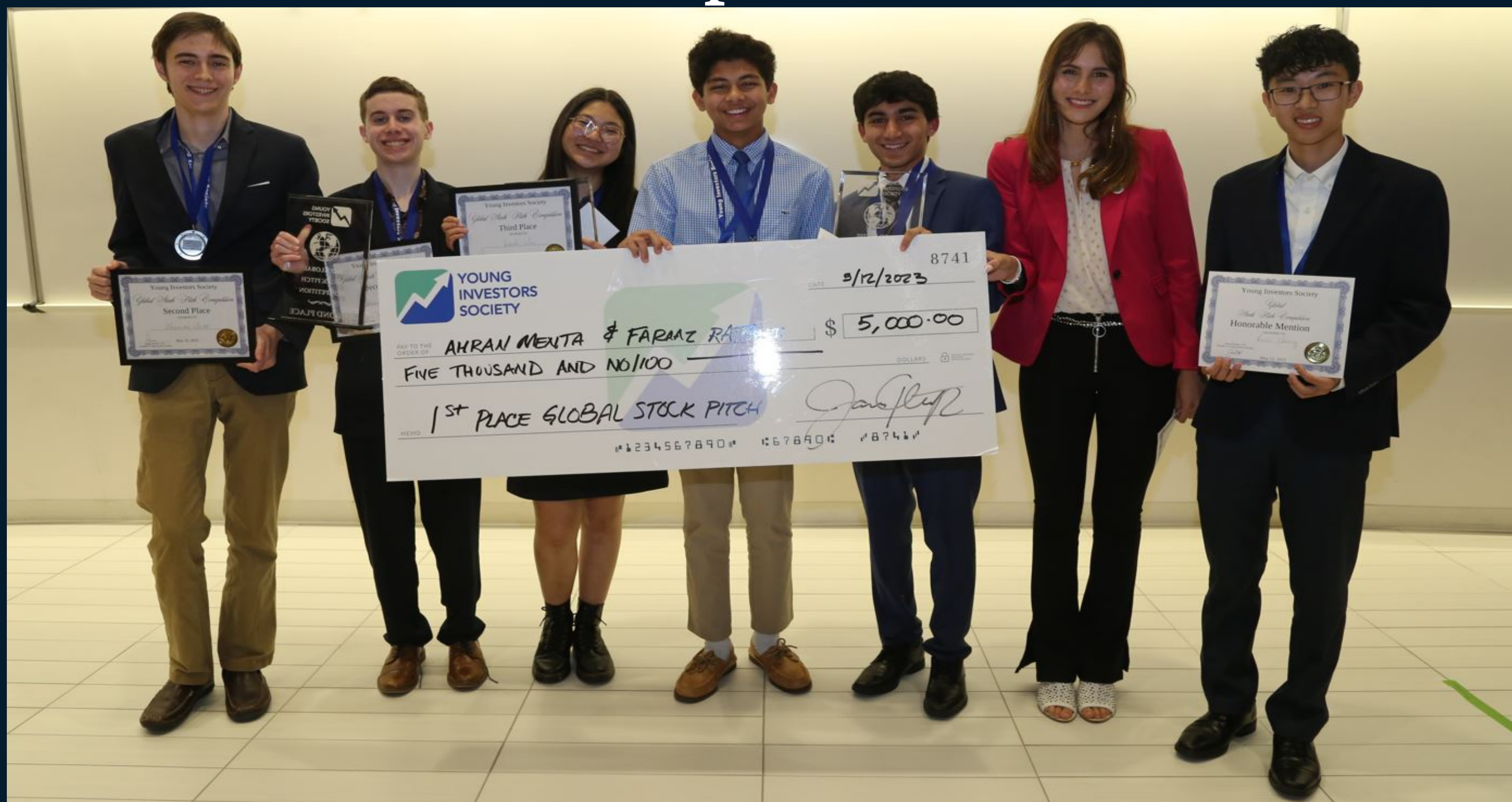


This year, the YIS Global Stock Pitch Workshops were hosted by Bloomberg, Goldman Sachs, Grandeur Peak Global Advisors, and First Community Bank. Students rotated through 4 workshops that covered Identifying Investments, Public Equity vs Private Equity, ESG Investing and What is Your Why?

YIS also hosted it's first Case Study Competition and the winning team won \$500 cash plus a paid internship!

The winning team included Jean L. and Siddhartha R. (VA) Ananya P. (CA) & Alson L. (China).

YIS Global Stock Pitch Competition



1st Place: Arhan M & Faraaz R. (VA)

2nd Place: Alex S & Alex W. (VA)

3rd Place: Leah W. (IL)

Honorable Mention: Lily T. (CA)

Honorable Mention: Kevin Z. (MN)

YIS had 443 teams from 24 states and 10 countries participate in the state/territory stock pitch competitions. The top 3 teams from each state/territory were invited to participate in the Global Stock Pitch Competition on May 11-12th in Salt Lake City, Utah hosted by the University of Utah.

2022-2023 Highlights

YIS Access Initiative



The YIS Access Initiative achieved a school growth of 32% this year serving 221 schools and over 1,600 students across 35 states.

The YIS Access Initiative currently serves 20% of total YIS students via afterschool program partners, school clubs, and individuals.

The YIS Access Initiative received the Money Awareness & Inclusion Award in 2022 for the Best Project for Underserved Communities.

Change the World 5K Charity Run



YIS hosted the first Change the World 5K Charity Run in Camarillo, California. The event drew local sponsorship support for the YIS Access Initiative as well as local organizations at the exhibit expo. Over 60 participants received a YIS event T-shirt, Goody Bag, and Finisher's Medal.

Invest in the Future Dinner & Fundraiser



The YIS Invest in the Future Dinner & Fundraiser event was held at the beautiful Utah Museum of Fine Arts in Salt Lake City. Local investment firms were in attendance as well as Bloomberg who joined us from NYC. Brian Murphy from Portfolio Advisors was the keynote speaker and Cici Yu from New Jersey received the Student Leader of the Year Award.

Community Champion Honoree Bloomberg Philanthropy



Bloomberg Philanthropy has pledged to support the YIS Access Initiative over the next three years.

The YIS Youth Community Champion Honoree recognizes exemplary businesses who engage within their community through leadership and service and exemplify the best of volunteerism, character, and a sense of caring and responsibility for youth organizations. They go above and beyond and exemplify what it means to be a good role model for the community.

2022-2023 YIS Outstanding Teacher Awards



Matt Bastan: The Fly Initiative, Rhode Island

Rachel Baum: J.L. Mann High School, South Carolina

Mark Van Cott: International School of Kuala Lumpur, Malaysia

Terry Kung: Honors Students Learning Academy, Canada

Angela Maher: Mountain View Academy, Washington

Kathy Marshall: Tolland High School, Connecticut

Dr. Paul Heideman: Ethical Culture Fieldston School, New York

Ho Ching Lau: Renaissance College, Hong Kong

Dana Johnson: BASIS Scottsdale Charter School, Arizona

Brian Boyer: Springville High School, Utah

Fernando Battle: Dominico Americano School, Dominican Republic

Mariana Garza Villalobos: Inverkids, Mexico

Sean Kelly: Woodhaven High School, Michigan

Ryan Burnsky: Sherwood High School, Maryland

Fong Mei Lan: HKSKH Bishop Hall Secondary School, Hong Kong

2022-2023 Corporate Sponsors & Partners

We are honored to have the following sponsors and partners support Young Investors Society during the 2022-2023 school year. Due to the generosity of our sponsors, we were able to continue to provide curriculum and programs to over 10,000 students across 46 states and 75 countries.

Bloomberg



GRANDEUR PEAK ADVISORS



Advisory Group
for life

**Goldman
Sachs**

GQG
PARTNERS



WEALTHSOURCE®

SCA

SEVEN CANYONS ADVISORS

CREDIT SUISSE



RONDURE
GLOBAL
ADVISORS



Evolution
Global
Advisors



O X B O W
CAPITAL MANAGEMENT



CFA Institute

MORNINGSTAR

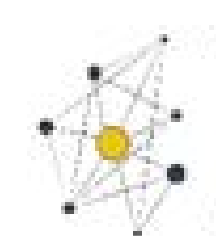
ETHOS
Investment Management



SUCCESS AND MONEY
FOUNDATION.ORG



ASDAN
China



WiFA
WOMEN in FINANCE ASIA

Thank You For Your Support Teacher & Parent Testimonials

" My students LOVE the competitive aspects of YIS including the Stock Pitch competition. The ability to work independently to extend their own thinking and learn using the Dollar-A-Day Challenge and CYIA designation is a HUGE hit with my students."

Kathy Marshall
Tolland High School
Connecticut



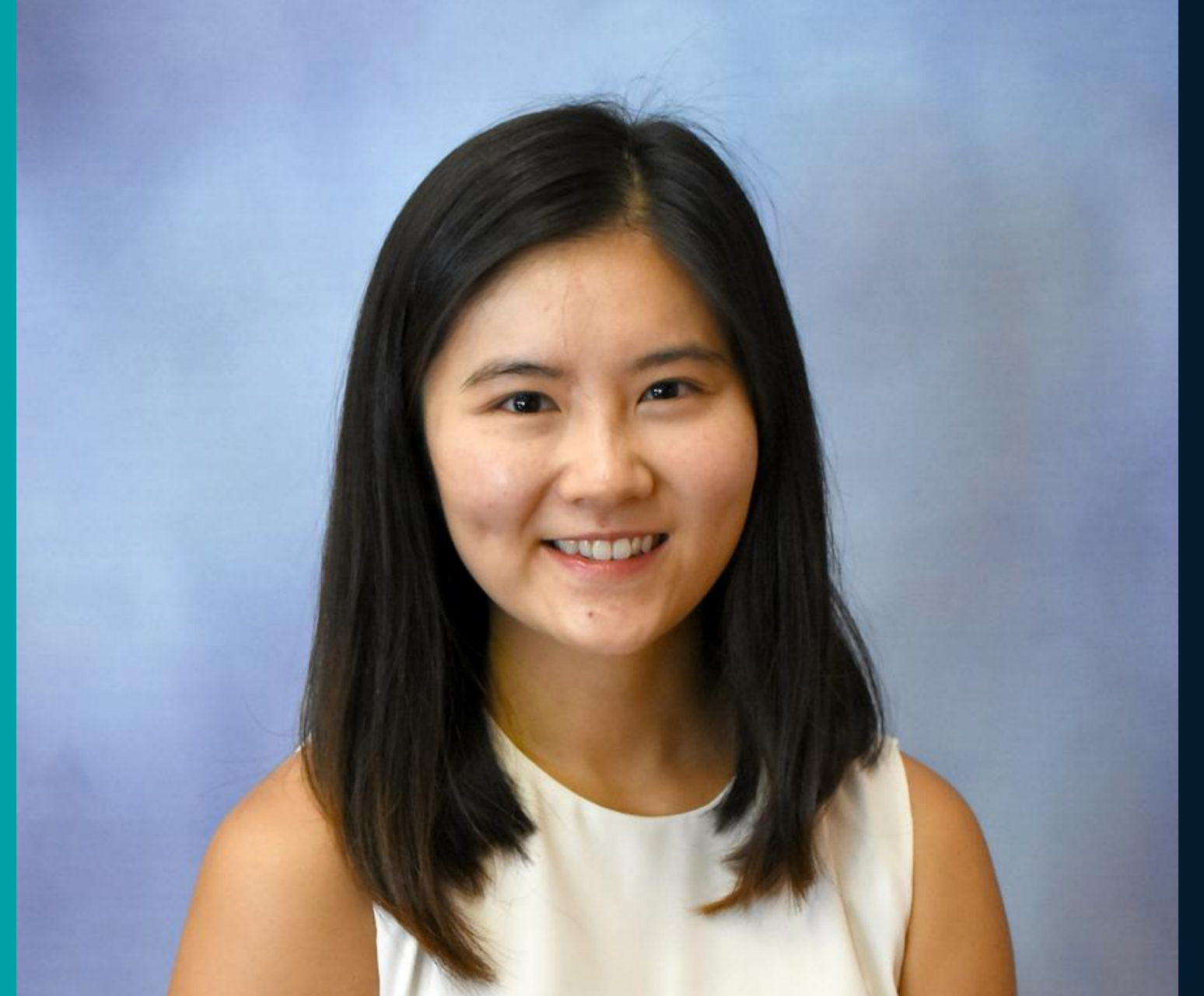
"Very impressed with the organization of YIS. The event speakers were excellent! I can tell that they really cared about all the kids and so passionate about YIS."

Jodi Skolnick
YIS Parent
Global Stock Pitch Competition



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

Angela Maher
Mountain View Academy
Washington



"I have really enjoyed offering this program over the years! The YIS curriculum makes it easier for me to share investing concepts with students."

Sean Kelly
Woodhaven High School
Michigan



"YIS is bigger and bigger every year. And I think it is a great thing to teach young kids about how to take care their financial need. Wish I had known that when I was young."

Ming Sung
YIS Parent
Global Stock Pitch Competition



"I would definitely encourage kids to join YIS. Great way for kids to self prepare, learn and network."

Rajeev Shanbhag
YIS Parent
Global Stock Pitch Competition



Thank You For Your Support

Student Testimonials

"YIS is the best opportunity you can get in high school to expand your financial knowledge. The activities and opportunities to network with professionals in the finance industry are unmatched. Truly an invaluable opportunity for those that will take advantage of it."

Riley B.
Springville High School
Utah



"I learned so much by attending the Global Stock Pitch Extravaganza, and I can't wait to attend the next few years as well!"

Jocelyn Y.
Montgomery High School
Maryland



"The YIS Global Stock Pitch Extravaganza was a phenomenal event. I got to network with students who shared the same burning passion for stocks as I did while also learning plenty from workshops and speakers."

Sameet D.
Archbishop Mitty High School
California



"I am so grateful for the opportunity to participate in YIS. I would highly recommend Global Stock Pitch competition to anyone who is interested in the financial field or looking to make lasting connections with people from all over the world."

Jacklin W.
Memorial High School
Texas



"YIS has truly expanded my horizons and equipped me with the knowledge and confidence to excel in the world of finance. I am immensely grateful for this incredible opportunity."

Queenie L.
Haas Hall Academy
Arkansas



"I was able to meet individuals with interests similar to my own. To this day, I continue to learn immensely from them. Looking into the future, I hope to continue contributing to this unique community."

Isabella Z.
Marymount School
Colombia



Young Investors Society

31248 Oak Crest Drive Suite 200

Westlake Village, CA. 91361

(805) 479-5292

www.YIS.org



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