



**YOUNG  
INVESTORS  
SOCIETY**

**STUDENT WELCOME PACKET**



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Welcome to Young Investors Society! (YIS) We are so excited to have you join us on this Financial Literacy journey! The student welcome packet should help you as you navigate your year with YIS. As always, if you have any questions, please reach out to our Chief Operating Officer, Christine Tobin at [Ctobin@yis.org](mailto:Ctobin@yis.org)



Greetings!

I am the founder of Young Investors Society ("YIS").

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 programs **promote financial literacy, teach personal finance skills, teach sound investment fundamentals** and **provide leadership and investment management experience** for high-school-age youth.

I started YIS because of a letter that I received from a young man named Edgar. After visiting his school in inner-city Los Angeles, and leading the class in an engaging discussion about the stock market and how investors pick companies to invest in, he wrote me the following:

*"It's awesome to have someone give their time to teach us, adults don't really do that anymore, especially for teenagers like me. You may think this is a joke, but your 45-minute presentation has changed my goals for my life. It has given me something to strive for."*

That letter burned in my soul. Edgar's statement that "adults don't really do that anymore" became a personal challenge for me that led me to start YIS.

Why does YIS exist? Because we believe financial education in the United States and abroad is inadequate at best. It does not begin to prepare students to manage their personal finances, let alone make responsible investment decisions in adulthood. **According to JumpStart, two-thirds of U.S. high-school students fail a basic financial literacy test.**<sup>1</sup>

YIS wants to change that. We offer a multi-pronged approach which includes school-sponsored investment clubs; beginning and advanced courses that teach personal finance & investment basics; annual stock pitch competitions; and our very popular Dollar-a-Day Challenge, as well as our CYIA® Designation. Our curriculum is written by some of the brightest minds in the industry and then packaged into engaging lesson plans and video content. We make the process **turn-key for teachers**, even those with little or no investment background. Simply put, we believe there is no other investment program out there as hands-on and as impactful to kids as YIS. We help kids **learn**, then **invest**, and then **inspire** others to do the same.

I thank you in advance and I look forward to working with you as we invest in the future generation!

With best regards,

A handwritten signature in black ink that reads "James Fletcher".

James Fletcher, CFA

Young Investors Society is a 501(3)(c) non-profit organization, which was founded by James Fletcher, CFA, portfolio manager at APG Asset Management. It is backed by Board Members with professional experience at prestigious academic institutions and leading asset management firms, including Harvard, Pepperdine University, the CFA Institute, Fidelity, Google, and Bank of America Merrill Lynch.

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<sup>1</sup> NFEC, National Financial Literacy Test Results, February 2014.



## Introduction to Young Investors Society

### Who We Are:

Young Investors Society (YIS) is a 501(c)3 non-profit that offers free high-quality financial literacy programs to high school students through its proprietary online platform. We aim to teach financial and long-term investing skills that will last a lifetime and empower students to take control of their financial futures. You can learn more about YIS on our website at [www.YIS.ORG](http://www.YIS.ORG). You can see our Overview Video here: <https://www.youtube.com/watch?v=NsgEwYEoTPU>

### Problem:

- Two-thirds of High School students fail a basic financial literacy test (JumpStart).
- 56% of Americans have less than \$10,000 saved for retirement (GoBankingRates).
- 76% of college students wish they had more help to prepare for their financial futures (KeyBank).

### Our Goal:

We aim to give high school students the opportunity to learn life-changing habits for saving and investing in stocks, in their communities, and in themselves. Our program has reached over 10,800 students in 46 states across the U.S. and 75 countries in Asia, Europe, Africa, and Latin America.

Our lessons consist of online interactive activities, engaging presentations, and curriculum support videos, along with peer-led activities focused on financial literacy and emphasizing the importance of saving and investing. There are engaging videos to accompany each lesson on our YouTube channel: <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ>. You can see a sample curriculum support video here: <https://youtu.be/xyD03G4oLzw>

**We recently launched our diversity & inclusion initiative (Access Initiative) to focus on under-resourced schools.** We hope to end the cycle of generational poverty by providing a financial literacy platform to underserved high school students, encouraging them to take an active role in their financial futures. Access schools now comprise more than 20% of our total students served. You can learn more about our Access Initiative here: <https://yis.org/about-yis/access-initiative/>

**Cost: Our program is 100% FREE** to students from all backgrounds and at all socio-economic levels. There are no curriculum costs for schools or teachers.

### Conclusion:

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.

## YIS Student Experience (Pathways)

**School Sponsored Clubs:** Students will create a YIS chapter at their school as part of the school club experience. Students will meet on campus at lunch or after school for 45-60 minutes weekly. Students will learn to create life-changing habits to save and invest for the future in a fun team environment supported by local teachers on campus. Each local chapter will learn the fundamentals of personal finance and progress through the program to learn the more advanced concepts of saving and investing. Students will compete with other YIS students using the MyYIS Portfolio, gain leadership experience, and learn many life lessons (e.g. hard work, patience, teamwork, etc.) They will also have an opportunity to participate in all other YIS programs.

### **Independent Student Learner:**

Individual students can participate in all YIS activities without a participating school or club. This is perfect for homeschooled students and for students who want to learn independently.

YIS is designed to be turn-key and can adapt to your needs. All lessons are web-based and can be accessed via mobile devices anytime, anywhere in the world. Students use the YIS YouTube videos to reinforce lesson concepts. All independent students can participate in the variety of programs available (Dollar-A-Day Challenge, Stock Pitch Competition, etc.)

### **Program Pathway:**

All students can participate in YIS program events. You just need to be a registered YIS student to participate in Teen Conferences, Dollar-A-Day Challenge, Fireside Chats, Stock Pitch Competition, etc.

### **In-Class Pathway:**

Teachers select YIS courses and lessons to integrate into the classroom experience. Teachers use downloadable lesson plans to teach in-class lessons and also use the YIS YouTube videos to reinforce lessons.

If you are looking for some structure to help you get started, here are some “best practices” that many of our schools have found helpful.

## BEST PRACTICES

- Typically, YIS is structured as an after-school club.
- The club meets weekly (usually 45-60 minutes)
- Majority of the clubs have a Club President, Vice President, Secretary, etc.
- In many cases, the teacher presents the material covered in the lesson plan during the meeting. However, the club should be student-led as much as possible, so one or more students may present some or all of the material covered in the lesson plan, present an idea of the week presentation or lead an activity.
- Each meeting should have pre- and post-meeting assignments designed to help the students prepare for the upcoming lesson or reinforce learning.



- Pre-meeting assignments are typically reading an article or watching a video. They can also be preparing an idea of the week's presentation related to the upcoming lesson or about a current market topic (e.g., something company specific).
- Post-meeting assignments are typically activities, readings, and/or quizzes that reinforce the concepts taught in the lessons and tie the concept to the Stock Pitch Competition.
- Club meetings are usually 45-60 minutes long but that time may vary depending on the school. The suggested club meeting agenda is:
  - Idea of the Week (5 minutes):
  - Have 1-2 students quickly present on a topic currently affecting the market (e.g., Apple announces a change in its long-term strategy and what the student thinks that means for the company).
  - Review Pre-Meeting Assignments (5 minutes)
  - Lesson (20 minutes)
  - Learning Activity (15 minutes)
  - Wrap Up

## Lesson Plans

Young Investors Society has created a curriculum written by some of the top investors in the world, complete with 40+ turn-key lesson plans that teach many fundamental investing concepts including accounting, finance, ethics, economics, psychology, mathematics, business strategy, and entrepreneurship. YIS lessons are comprised of online interactive activities, engaging presentations, and curriculum support videos along with peer-led activities focused on financial literacy lessons that emphasize the importance of saving and investing for the future. YIS has courses and lessons available for students to self-select depending on their comfort and skill level.

### **Money Skillz Bootcamp: Intro to Personal Finance**

Young Investors Society has launched the Money Skillz Bootcamp for students in 7th-12th grade! This beginner 10-hour course comprised of The Seven Golden Rules of Investing and the 5 Steps to Financial Freedom will give students a foundation in personal finance, saving, and investing that will lay the foundation for future YIS lessons & programs. This course can be started at any time and is structured as a student self-study course that meets all the criteria for current distance learning methods.

Students will learn the fundamentals of earning money, saving, budgeting, banking, investing, career exploration and so much more!

### **Investing: 7 Units + 2 Advanced Investing Units**

The Investing Units are designed for YIS students who have basic knowledge of finances and want to learn investment principles. The Advanced Investing Curriculum is our main program and most students will start

with the Money Skillz Bootcamp and then continue on to our 7 units of courses & lessons as well as an additional 2 Units of Advanced Investing necessary to participate in the stock pitch competitions.

The Investing Curriculum Series includes lessons in the Stock Market, Investment Principles, Stock Value, Identifying a Good Business, The Language of Finance, Investment Thesis, and Intrinsic Value. This series is comprised of 31 lessons that prepare students for the Stock Pitch Competition held in April each year. The Stock Pitch Competition emphasizes an in-depth company overview and valuation based on P/E Ratios. Students have the opportunity to write and present a stock pitch report and presentation. Students will upload their presentation to YouTube and the top students will be invited to compete in the Global Stock Pitch Competition in May 2024.

Each lesson plan contains the following resources:

- PDF lesson plan including:
  - Mapping to Common Core standards
  - Objectives
  - Suggested resources (websites, books, articles)
  - Handouts with practice problems and answer keys
  - Prezi presentation
  - Videos and links to other resources (as necessary) on YIS website and YIS YouTube Channel: <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ>

## LESSON PLAN OUTLINE

### **MONEY SKILLZ BOOTCAMP: Intro to Personal Finance–10 weeks**

- **5 STEPS TO FINANCIAL FREEDOM**
  - Lesson 1 – Earning Money
  - Lesson 2 – Saving Money
  - Lesson 3 – Developing a Financial Plan
  - Lesson 4 – Investing and The Power of Compounding
  - Lesson 5 – Avoiding Common Mistakes
  
- **THE SEVEN GOLDEN RULES OF INVESTING**
  - Lesson 1 – Who Are Investors? Why Invest?
  - Lesson 2 – What Does it Mean to Invest in the Stock Market?
  - Lesson 3 – Beating the Market
  - Lesson 4 – The Seven Golden Rules of Investing

**INVESTING: 7 Units + 2 Advanced Investing Units: 30 weeks**

- **UNIT 1 - THE SEVEN GOLDEN RULES OF INVESTING**
  - Lesson 1 – Who Are Investors? Why Invest?
  - Lesson 2 – What Does it Mean to Invest in the Stock Market?
  - Lesson 3 – Beating the Market
  - Lesson 4 – The Seven Golden Rules of Investing
  
- **UNIT 2 - THE VALUE OF A STOCK**
  - Lesson 1 – Fluctuations & Market Caps
  - Lesson 2 – What is the Value of a Business
  - Lesson 3 – Applying the P/E Ratio
  
- **UNIT 3 - WHAT MAKES A GOOD BUSINESS**
  - Lesson 1 – How Do I Know if a Company is a Good Business?
  - Lesson 2 – Whatever Floats Your Moat
  - Lesson 3 – Predicting the Future
  
- **UNIT 4 - FINDING STOCKS TO INVEST IN**
  - Lesson 1 – Coming Up with Investment Ideas
  - Lesson 2 – Using Research Reports to Evaluate Stocks
  - Lesson 3 – Make a List
  
- **UNIT 5 - THE LANGUAGE OF FINANCE**
  - Lesson 1 – Introduction to the Language of Finance
  - Lesson 2 – Why Do Companies Prepare Financial Statements?
  - Lesson 3 – The Income Statement
  - Lesson 4 – How Do I Forecast Revenues of a Company?
  
- **UNIT 6 - INTRINSIC VALUE**
  - Lesson 1 – Introduction to Intrinsic Value
  - Lesson 2 – Let's Buy a House
  - Lesson 3 – Determining the Intrinsic Value of a Company
  - Lesson 4 – The Relative Valuation Method
  
- **UNIT 7 - THE INVESTMENT THESIS**



- Lesson 1 – Introduction to Investment Thesis
- Lesson 2 – What is an Investment Thesis?
- Lesson 3 – Case Study
- **ADVANCED INVESTING - ENVIRONMENTAL SOCIAL GOVERNANCE**
  - Lesson 1 – Impact Investing, Sustainability & ESG Integration Overview
  - Lesson 2 – Assessing Corporate Governance Overview
  - Lesson 3 – Assessing Social & Environmental Standards Overview
  - Lesson 4 – Case Study on Tesla: Assessing ESG Overview
- **ADVANCED INVESTING - FINANCIAL STATEMENT ESSENTIALS**
  - Lesson 1 – Financial Statements & The Balance Sheet
  - Lesson 2 – Income Statement & Statement of Cash Flows
  - Lesson 3 – Financial Ratios
  - Lesson 4 – Forecasting Growth

**YIS CURRICULUM SAMPLE SCHEDULE – CLUB MODEL (MEETING ONCE PER WEEK e.g. Thursday)**

Week	Date	Lesson Title
1	9/7/2023	<b>YIS First Class Presentation/ Overview &amp; Meet &amp; Greet</b>
2	9/14/2023	<b>Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 1: Who Are Investors?</b>
3	9/21/2023	<b>Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 2: What Does It Means to Invest In the Stock Market?</b>
4	9/28/2023	<b>Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 3: Beating the Market</b>
5	10/5/2023	<b>Money Skillz Bootcamp: 7 Golden Rules of Investing: Lesson 4: The Seven Golden Rules of Investing</b>
6	10/12/2023	<b>The Value of a Stock: Unit 2: Lesson 1: Fluctuation &amp; Market Cap</b>
7	10/19/2023	<b>The Value of a Stock: Unit 2: Lesson 2: What is the Value of a Business?</b>
8	10/26/2023	<b>The Value of a Stock: Unit 2: Lesson 3: Applying the P/E Ratio</b>
9	11/2/2023	<b>What Makes a Good Business?: Unit 3: Lesson 1: Whatever Floats Your Moat</b>
10	11/9/2023	<b>What Makes a Good Business?: Unit 3: Lesson 2: Predicting the Future</b>
11	11/16/2023	<b>What Makes a Good Business?: Unit 3: Lesson 3: How Do I Know if a Company is a Good Business?</b>
12	11/23/2023	<b>Finding Stocks to Invest In: Unit 4: Lesson 1: Coming Up with Investment Ideas</b>
12	11/30/2023	<b>Finding Stocks to Invest In: Unit 4: Lesson 2: Using Research Reports to Evaluate Stocks</b>
13	12/1/2023	<b>Finding Stocks to Invest in: Unit 4: Lesson 3: Make a List</b>
14	12/7/2023	<b>Learning to Speak the Language of Finance: Unit 5: Lesson 1: Intro</b>
15	12/14/2023	<b>Learning to Speak the Language of Finance: Unit 5: Lesson 2: Why Do Companies Prepare Financial Statements?</b>
16	12/21/2023	<b>Learning to Speak the Language of Finance: Unit 5: Lesson 3: The Income Statement</b>
17	12/28/2023	<b>Learning to Speak the Language of Finance: Unit 5: Lesson 4: How Do I Forecast Revenues of a Company?</b>
18	1/4/2024	<b>Intrinsic Value: Unit 6: Lesson 1: Introduction to Intrinsic Value</b>
19	1/11/2024	<b>Intrinsic Value: Unit 6: Lesson 2: Let's Buy a House</b>
20	1/18/2024	<b>Intrinsic Value: Unit 6: Lesson 3: Determining the Intrinsic Value of a Company</b>
21	1/25/2024	<b>Intrinsic Value: Unit 6: Lesson 4: The Relative Valuation Method</b>
22	2/1/2024	<b>The Investment Thesis: Unit 7: Lesson 1: Introduction to Investment Thesis</b>
23	2/8/2024	<b>The Investment Thesis: Unit 7: Lesson 2: What is an Investment Thesis?</b>
24	2/15/2024	<b>The Investment Thesis: Unit 7: Lesson 3: Case Study</b>
25	2/22/2024	<b>ESG: Lesson 1: Impact Investing, Sustainability, &amp; ESG Integration Overview</b>
25	3/1/2024	<b>ESG: Lesson 2: Assessing Corporate Governance Overview</b>
26	3/8/2024	<b>ESG: Lesson 3: Assessing Social &amp; Environmental Standards Overview</b>
27	3/15/2024	<b>ESG: Lesson 4: Case Study on Tesla: Assessing ESG Overview</b>
28	3/22/2024	<b>Financial Statement Essentials: Lesson 1-Finance Statements &amp; Balance Sheet</b>
29	3/28/2024	<b>Financial Statement Essentials: Lesson 2-Income Statement &amp; Statement of Cash Flows</b>
30	4/4/2024	<b>Financial Statement Essentials: Lesson 3-Financial Ratios</b>
31	4/11/2024	<b>Financial Statement Essentials: Lesson 4-Forecasting Growth</b>

## Young Investors Society Programs

Young Investors Society has a variety of enrichment programs and contests outside of the courses and lessons for your students to enter. These programs are designed to enrich our curriculum and give students the chance to put their investment knowledge and skills to use.

### Dollar-A-Day Challenge



Young Investors Society challenges every student to start saving and investing their own money into a personal brokerage account. This program allows the students to experience the power of compound interest with real money and to create great habits that will help them secure their financial future. Students can also compete for a FREE Money Match scholarship on a monthly basis. A limited number of YIS students will receive a scholarship match for their contributions. This program helps students develop the lifetime habit of saving and investing for retirement as well as understand the value of long-term decisions. The Dollar-A-Day Challenge is currently being revised to serve more students than ever before. Look for the NEW Dollar-A-Day Challenge requirements coming this November!

#### THE MOTIVATION

The average American has only \$148,000 saved by the time they reach age 65. Members of the Young Investors Society, however, are not average. YIS students can accumulate way more than that in their lifetime.

Say you cut back on one can of soda per day (\$1 a can), resulting in savings of \$365 by the end of the year per year. By saving this amount each year and investing it at 11% (a bit above the 10% stock market average of the S&P 500 for the past century), this is worth \$1.4 million by the time you retire (age 70) That's pretty impressive! But it gets better... YIS has an amazing group of donors that invest in students willing to take action.

#### HOW TO REGISTER

The Dollar-A-Day Challenge will be available on a monthly basis starting in November 2023. Students will complete the requirements and register on the Dollar-A-Day Challenge page: <https://yis.org/programs/the-dollar-a-day-challenge/>

## YIS Fireside Chats

These virtual events serve high school students from schools across the globe and will be held twice a year. The students learn valuable skills in personal finance, fundamentals of investing, careers in finance, fintech, asset management and so much more from a variety of finance professionals in this webinar/workshop setting. Students have an interactive experience with a Question & Answer session with event speakers.

### HOW TO REGISTER

Fireside Chat registration will be on the YIS event page: <https://yis.org/events/>. Registration will open in October 2023.

## YIS Mid-Year Finance Competition

New this year to YIS is the YIS Mid-Year Finance Competition.

Students will have the opportunity to compete against other YIS members in this fun and innovative online competition. More information will be released prior to the event in January 2024.

### HOW TO REGISTER

YIS Mid-Year Finance Competition registration will be on the YIS event page: <https://yis.org/events/>. Registration will open in December 2023.

## Learn & Earn



Learn & Earn™ is excited to invite Young Investors Society members to start turning knowledge into wealth! Whether you're getting a head start or catching up on becoming an investor, Learn & Earn™ helps empower you to take the first step in preparing for a successful future.

Learn & Earn™ is an app for students to learn about money, entrepreneurship, technology, careers, college prep, mental health, and more awesome topics through bite-sized courses. By completing courses, you earn money contributed by sponsors, such as brands and non-profit organizations, as well as by parents/guardians and family members. If a student is 18 or older, they have the choice to grow their balance on top of what they can earn by adding their own money! Funds are invested into the real stock market through ETFs and fractional shares. The best part is that they get to explore and add stocks to their portfolio!

### HOW TO REGISTER



Click here <https://www.learnandearn.com/> to download Learn & Earn from the App Store or Google Play Store.

Register for Learn & Earn with your phone number.

If you're under 18, ensure the YIS class code **947947** is entered during the registration process.

If you're over 18, make sure to select the option that states, "I want to use the app to learn & earn myself" during the registration process.

Sign up for your investment account.

If you're under 18, you will be able to send a link to your parent or legal guardian asking them to finish setting up your Learn & Earn™ account. Once your parent has approved your investment account, your course earnings will be invested.

If you're over 18, we will ask you a couple of quick questions to gather information required by the SEC for regulatory purposes. You can confirm your YIS class code **947947** is entered by navigating to the Account Info screen.

\*The Learn & Earn App is only available to students based in the United States.

## YIS Certified Youth Investment Analyst (CYIA®) Designation



The highest honor within the Young Investors Society is to be awarded a Certified Young Investment Analyst (CYIA®) Designation.

The CYIA® Designation represents a tremendous achievement. Less than 10% of those students that enter YIS end up achieving the CYIA® Designation. It is widely respected by Universities and future employers. High school students who are able to earn the CYIA® have proven that they are the best of the best. They have mastered the fundamentals of stock analysis, studied for and passed a rigorous examination, that covers advanced financial concepts, maintain a stellar GPA, and are uniquely prepared to major in business, finance, or accounting.

## HOW IT WORKS

Students must complete the following requirements for the CYIA™ Designation:

- Be an active member of Young Investors Society
- Participate in a YIS State Stock Pitch Competition.
- Participate in the Dollar-A-Day Challenge (Open an investment account & save/invest your own money)
- High School Teacher or (YIS Advisor) Letter of Recommendation.
- Participate in a Community Service Project – 10 hrs.
- Minimum GPA of 3.0 or equivalent.
- Conduct a final interview with a YIS Board Member.
- Pass the 60-question CYIA™ exam (50% pass rate). The exam will be available quarterly.

### Online Exam Information:

The CYIA™ Exam is an open-book, 60-minute timed test based on The Essays of Warren Buffett & the YIS Stock Investing 101 e-book.

The YIS Stock Investing 101 eBook:

<http://yis.org/wp-content/uploads/2016/10/Stock-Investing-101-eBook.pdf>

The Essays of Warren Buffett 3rd Edition by Lawrence Cunningham:

<https://www.amazon.com/The-Essays-Warren-Buffett-Corporate/dp/1611634091>

The exam is open Quarterly in **January, April, August, & November**.

When you are ready to take the Exam, click here: <https://www.flexiquiz.com/SC/N/YISCYFAEXAM>

Students can apply for the CYIA designation at any time during the year once all requirements are met to [Ctobin@yis.org](mailto:Ctobin@yis.org). Students can download the CYIA application at: <https://yis.org/programs/cyia-designation/>

## Stock Pitch Competition



This competition is the culmination of investment skills gained during the year and provides students with hands-on mentoring in financial analysis. Students (individually or in teams of two) create a “best stock idea” and analyze a publicly traded company. Each student/team writes a report on their chosen company with a “Buy” or “Sell” recommendation and then defends their analysis in a written report and brief to a panel of university professors and industry professionals. The winners advance through the state, regional, and global



competition, where one team emerges as the Global Stock Pitch Champion. The competition rewards long-term, original business analysis, and presentation skills. You can review a sample of stock pitch reports and presentations at the bottom of the page here: <https://yis.org/programs/stock-pitch-competition/stock-pitch-report/>

## HOW IT WORKS

All students are welcome to participate in the stock pitch competitions. We advise students to complete courses 4-7 and the additional 2 advanced courses in preparation for the event. State events will be listed in the MYYIS Event Calendar. State event registrations will be open in February and the registration fee is \$25.00 per person. State events require students to submit their stock pitch presentation via YouTube video submission. State submissions will be evaluated by a panel of stock pitch judges.

Winners will be invited to participate in the Global Youth Investment Summit event in May 2024.

(Details to be announced)

## HOW TO REGISTER

Stock Pitch Registration opens **February 12, 2024** on the MYYIS Portal.

Log into the MyYIS Portal, Click on the calendar on the top of the page. Search for the competition in your state and click on participate. Each team member must register individually. Be sure to click on the event to see any special instructions.

**Registration closes for all competitions on April 3, 2024. All stock pitch reports & presentations are DUE April 3, 2024.**

### Important Dates

- Deadline to register for State Stock Pitch Competitions: April 3, 2024
- Deadline to submit Stock Pitch Report & Presentation Report: April 3, 2024
- State Competitions: April 8th-April 30, 2024

### Global Youth Investment Summit

- May, 2024

## STOCK PITCH REPORT GUIDELINES

Each student or team is required to submit **BOTH** a written stock pitch report and Stock Pitch Presentation.

The written report must:

- Be no longer than 10 pages; although it may include an appendix of infinite length

- Include the following information:
  - Student Name, School, State/Region, Email Address
  - Company name
  - Exchange or Ticker symbol
  - Sector or Industry
  - Recommendation (Buy/Sell/Hold)
  - Current price (as of submission date)
  - Target price (% increase/decrease)
- Contain only publicly available information
- Be the original work of the student(s)
- Be prepared from the perspective of an independent research analyst
- Include, without limitation, the following sections:
  - Business Description
  - Industry Overview and Competitive Positioning
  - Investment Summary
  - Valuation
  - Financial Analysis
  - Investment Risks
  - ESG Considerations
  - Energy Transition
  - AI Considerations

## STOCK PITCH PRESENTATION GUIDELINES

The Stock Pitch Presentation must:

- Be a summary of the Stock Pitch Report done on PowerPoint or Google Slides.
- Include the following information on the slides:
  - Student Name, School, State/Region, Email Address
  - Company name
  - Exchange or Ticker symbol
  - Sector or Industry
  - Recommendation (Buy/Sell/Hold)
  - Current price (as of submission date)
  - Target price (% increase/decrease)
- Contain only publicly available information
- Be the original work of the student(s)
- Be prepared from the perspective of an independent research analyst
- Include, without limitation, the following sections:
  - Business Description



- Industry Overview and Competitive Positioning
- Investment Summary
- Valuation
- Financial Analysis
- Investment Risks
- ESG Considerations
- Energy Transition
- AI Considerations

## SUBMISSION GUIDELINES

Stock Pitch Reports can be saved as a PDF and may be submitted via email to: [Stockpitch2024@yis.org](mailto:Stockpitch2024@yis.org) on or before **April 3, 2024** for the 2023-2024 Stock Pitch Competitions.

Stock Pitch Presentations can be saved as PowerPoint or PDF and may be submitted via email to: [Stockpitch2024@yis.org](mailto:Stockpitch2024@yis.org) on **April 3, 2024** for the 2023-2024 Stock Pitch Competitions.

**Both** Stock Pitch Report & Stock Pitch Presentations must be submitted prior to the deadline to be eligible to compete in the Stock Pitch Competitions. There will be no exceptions.

## HOW TO GET HELP

This section of the website is full of helpful things designed to give you an edge: <https://yis.org/programs/stock-pitch-competition/>

There are videos, templates, report submission guidelines, and more to help create a winning report and presentation. Be sure to explore the website and our YouTube channel for previous winning stock pitches and help with your stock pitch report.

You can review previous stock pitch reports and presentations here:

[https://drive.google.com/drive/u/1/folders/1ilsbYjOawzcPywAuDsR\\_fO6cYWcVpdqI](https://drive.google.com/drive/u/1/folders/1ilsbYjOawzcPywAuDsR_fO6cYWcVpdqI)

### Stock Pitch Prep Night

YIS will host a Stock Pitch Prep Night on Zoom video where Regional Advisory Board Members and previous stock pitch judges will give advice on stock pitches, and presentation tips, and answer any questions related to the event and scoring.

## Student MyYIS Portfolio

### STUDENT MY-YIS PORTFOLIO OVERVIEW

The MyYIS Portfolio is an exciting, interactive way for students to practice the principles they are learning in the courses in a competitive, simulated environment. Students Log-in to the MyYIS portal to access their portfolio.

- Students need two things to build their MyYIS Portfolio: Net Worth and Credits.
  - “Net Worth” is the money (i.e., sorry not real money... MyYIS \$’s) that students earn as they complete the lesson plans and quizzes associated with the lesson plans.
  - Credits are earned by completing the courses and passing the quizzes. Each stock submission uses one credit.
- Once students have Credits and Net Worth, they can invest it in companies of their choice. To do that, they must:
  - Write a quick stock pitch on that company and publish it on the YIS website before they can “buy” the stock.
  - The stock pitch is 100 characters or less and they should state the reason for choosing the company.
  - Choose how much of their Net Worth they want to put into that company.
  - They cannot “Sell” until they reach a certain level, so have them choose wisely.
- They will watch their net worth change as the market changes and compete against the broad YIS community. The Leaderboard section of the MyYIS portal shows their rank vs. the YIS community.
- They can check out the Stock Portfolio section of the MyYIS portal to see what others in the YIS community have posted. They can give feedback to their fellow members by giving their pitch a thumbs up or down.
- Bonus: The stock pick that receives the most thumbs-up votes at the end of each month will receive an extra \$1 million net worth of dollars.

The Student Dashboard is an overview of the student’s Level, Net Worth, and Rank. It also shows the student which Course they are on and what Levels have been completed.

## STOCK PITCH PORTFOLIO

Students earn Stock Pitch Credits by completing all the lessons in a Course and Quizzes.

Stock Pitch Credits are used to “pitch” a stock in the Stock Portfolio. Each stock pitch uses one credit. Students can check their available stock credits by clicking on the Stock Portfolio Tab/Submit A Stock. Once students have Credits and Net Worth, they can invest in the companies of their choice. To do that, they must:

- Write a quick stock pitch on that company and publish it on the Stock Portfolio/Submit A Stock page before they can “buy” the stock.
- The stock pitch is 100 characters or less and they should state the reason for choosing the company.
- Choose how much of their Net Worth they want to put into that company.
- They cannot “Sell” until they reach a certain level, so have them choose wisely.
- Bonus: The stock pick that receives the most thumbs-up votes at the end of each month will receive an extra \$1 million net worth of dollars.

## STUDENT LEADERBOARD

The leaderboard shows the ranking of all YIS students who have completed courses and lessons. This page shows their Level, Net Worth, Rank, and Last Stock Pitched on the Mock Portfolio.

## COURSES

The courses page is where students can go to complete lessons, view Prezi presentations, and take quizzes. All courses are listed here and lessons can be downloaded from here.

## QUIZZES

Each lesson has a brief quiz at the end that the students must pass in order to earn MyYIS money towards their Net Worth. The money earned depends on how many questions are answered correctly.

## NEWS & EVENTS

YIS blog posts and articles pertaining to the finance world will be posted here for students to read, review, or use as topics for the Idea of the Week. Students can submit their own articles to be posted for all by submitting to [Ctobin@yis.org](mailto:Ctobin@yis.org)

## CALENDAR

All Stock Pitch Competitions will be posted on the Calendar. Each State event will be conducted via YouTube video submissions. Students will find their State Stock Pitch Competition and click to register for the event. All students must register for the event individually. The registration fee for the state stock pitch competitions is \$25.00 per person.

## Student Resources

We would like to thank you in advance for starting or joining or starting a YIS Chapter at your school. We hope to give you as many resources as you need for your club to succeed this year and in the years to come.

## VIDEOS FOR STUDENTS

We have several introductory videos on our YouTube Channel. They cover each aspect of YIS, from the Stock Pitch Competition to the Dollar-A-Day Challenge to a mock classroom experience. Please watch these videos at your convenience to help prepare you for YIS at your school. YIS Videos can be found here:

<https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

## FOLLOW US ON SOCIAL MEDIA



Young Investors Society uses Facebook, Instagram, Twitter, LinkedIn, and YouTube to keep our teachers and students updated on new content, updates, activities, and contests. Please follow our social channels so you can stay updated with YIS!

**Facebook:** <https://www.facebook.com/yisorg/>

**Instagram:** <https://www.instagram.com/yisorg/>

**X (Formerly Twitter):** <https://twitter.com/YISORGANIZATION>

**LinkedIn:** <https://www.linkedin.com/company/young-investors-society/>

**YouTube:** <https://www.youtube.com/channel/UCxAmBT67-w01EfmoT-pD9MQ/videos>

## ADDITIONAL RESOURCES

- [YIS Website](#): Curriculum Courses, Lessons, & Programs
- [YIS YouTube Channel](#): Curriculum Videos, Interviews, Stock Pitches, etc
- [YIS Merchandise](#): YIS T-shirts, Hoodies, and other branded items
- [YIS Stock Investing 101 E-Book](#): Student & Teacher Handbook for Courses & Lessons
  
- [Finscreener.com](#): great online stock screener, earnings reports, and summaries for stock pitch reports.
- [Morningstar.com](#): best site for company research including company ratios and financials
- [Google Screener](#): most robust free screening tool, allows you to add many different criteria.
- [Seekingalpha](#): online portal for company stock reports and market news
- [Motleyfool.com](#): great online portal for news, market perspective and stock ideas.
- [Zacks.com](#): for company research including ratios and screens
- [Gurufocus](#): for company analysis
- [Wallstreetsurvivor](#): for basic stock concepts and leagues to run mock portfolios.
- [Yahoo Finance](#): for stock charts and basic company information
- [Investopedia](#): the “Wikipedia” of Investing, great online glossary of terms
- [Stockcharts](#): for tracking stock market performance and comparison between stocks.
  
- **Other Resources:**
  - [ClayTrader](#): a great Podcast resource featuring a Trading 101 series, which helps educate those that want to learn about the stock market and how it works, along with other series including Trading Guides, Trading Tools, Case Studies, and Chart Analysis.
  
  - [Annuity.org](#): a great resource for basic financial literacy topics such as budgeting, credit, planning for retirement and so much more.
  
- **Books:**
  - *Essays of Warren Buffett*: by Warren E. Buffett and Lawrence A. Cunningham
  - *The Little Book That Beat the Market*: by Joel Greenblatt
  - *The Early Investor*: by Michael Zisa

## YIS MERCHANDISE

YIS offers a variety of t-shirts, hoodies, bags, mugs, and accessories available on the YIS Merchandise Store. 100% of all merchandise proceeds go to fund YIS programs. Get your YIS club merchandise here: <https://young-investors-society.myspreadshop.com/>



Young Investors Society LOGO - Sweatshirt Cinch Bag  
\$20.49



Young Investors Society LOGO - Coffee/Tea Mug  
\$14.99



Young Investors Society LOGO - Tote Bag  
\$18.49



## FREQUENTLY ASKED QUESTIONS

We are relying on you to help us know what additional resources you need to help YIS and your club to succeed. Please email us any questions and feedback at [Contact@yis.org](mailto:Contact@yis.org) so we can improve YIS. As we receive questions, we will be adding to our FAQs, which we will share with you.

### **Q: How do I start my own YIS Club?**

**A:** YIS has all the resources you need to start your own high school club. Please visit our website at: <https://yis.org/join-young-investors-society/start-your-own-chapter/>

You will find information on how to register, start your club, and our First Club Meeting Presentation and Recruitment Flyer. **Each club will need 1 Teacher Advisor & at least 3 registered students to be recognized as an official YIS Chapter.**

### **Q: Do I need find a Business/Economics Teacher to teach YIS?**

**A:** No, many of our teachers have no financial background. Many teach other subjects such as English, Math, Science, etc. YIS is structured as a turn-key platform that anyone can teach. Most of our clubs are student-led and the teacher is there for support.

### **Q: How many students should I have in the club?**

**A:** YIS would like to see 5-10 students per club. We have found that clubs with at least 10 students per club allow for team activities and provide a social network for the students.

### **Q: Does YIS take donations?**

**A:** Yes, YIS is a 501(C)3 nonprofit organization and relies on corporate sponsors and individual donations to be able to provide our financial literacy programs. All donations are tax-deductible. Visit our donation page here: <https://yis.org/donate/>

### **Q: I have a mix of brand new Freshman and seasoned Upper Classmen, how should I structure the club?**

**A:** YIS Suggests having everyone meet together at the beginning of the meeting to go over Idea of the Week Presentations, pre-assignments, etc. Students can then break into groups for the lessons and work on content in their groups. One group can work on the Money Skillz Bootcamp while the other starts on the Advanced Unit lessons.

### **Q: How many kids can apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships?**

**A:** We would love to see ALL YIS students apply for the Dollar-A-Day Challenge and FREE Money Match Scholarships. YIS plans to triple the number of students that receive the FREE Money Match Scholarships this year.

### **Q: Where do I get updates on upcoming events and submission deadlines?**

**A:** YIS will email you regularly about our upcoming program, events, and deadlines.

You should also receive our Monthly Newsletter which contains all important events and deadlines for submission. You can also visit our website at [www.yis.org](http://www.yis.org) and follow us on our social media channels for important news and events.



## QUESTIONS

If you have any questions about YIS curriculum, lessons, or just need to chat with someone about your YIS club, please contact our Chief Operating Officer, Christine Tobin at [Ctobin@yis.org](mailto:Ctobin@yis.org) (805) 479-5292.