

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. You can view our Overview Video here:

<https://www.youtube.com/watch?v=NsgEwYEoTPU&t=17s>

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. We successfully piloted the program in 6 schools in 2014-15, added 46 more in 2015-16 and **now, in our 10th year, have over 2,300 schools** and counting. Our program has reached over 12,000 students in 46 states across the U.S. and 80 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://www.youtube.com/watch?v=JPBJyZkUgsU>

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. 21% of total students are served through the Access Initiative. 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.

Our Programs:

Money Skillz Bootcamp: This is a 10-hour introductory personal finance course for 7th-9th graders that teaches the Seven Golden Rules of Investing as well as the Five Steps to Financial Freedom. It is structured as a student self-study course and meets all the criteria for current distance learning methods.

Courses, Lessons, and Videos: We offer over 40 engaging 45-min lesson plans to help students learn the basics of investing, personal finance, economics, and accounting. Each lesson has a downloadable lesson plan, an interactive Prezi presentation, and an interactive quiz at the end of each lesson.

School Sponsored Clubs: To ensure a rich experience, YIS will teach students to create life-changing habits of saving and investing in a fun team environment. Each local chapter will learn about personal finance, saving, and long-term investment strategies, including subjects on accounting, business ethics, economics, finance, and entrepreneurship. 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 YIS programs.

Dollar-a-Day Challenge: YIS helps students to start saving one dollar per day into a personal brokerage account, and investing it. Students learn the power of compound interest and start to actively save for retirement. They can also compete for a donor match scholarship by completing a personal finance quiz. This year, we plan to award matching scholarships to over 200 students. This program helps students develop the lifetime habit of saving and investing for retirement as well as to understand the value of long-term decisions.

Global Stock Pitch Competition: This competition is the culmination of investment skills gained during the year and provides high school 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 industry professionals. The winner of each local competition advances to the regionals, and then to the global final, where one team emerges as the Global Stock Pitch Champion. Local, regional, and global competitions occur between April and May every year. The competition rewards long-term thinking, original business analysis, and presentation skills. You can watch the 2023 Global Stock Pitch Competition here: <https://www.youtube.com/watch?v=4NsHcTx2zg>

YIS Fireside Chats: These virtual events serve approximately 300+ high school students from schools across the world. 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. Finance trivia games between speaker sessions make this event fun and entertaining for all. Students have the opportunity to win prizes and have an interactive experience with a Q & A session with event speakers.

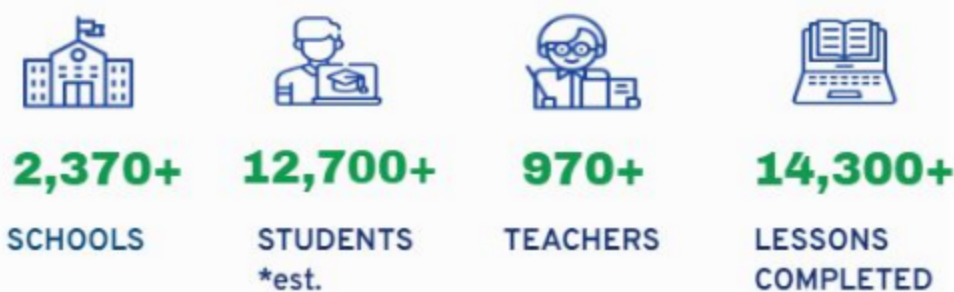
CYIA® Designation: This is the highest achievement within Young Investors Society. Students qualify by studying for and passing a rigorous 60-question finance exam, participating in the stock pitch competition, engaging in community service, and maintaining a high GPA. The CYIA® Designation is recognized by a growing number of universities and firms as an honor for teenagers around the world.

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.

MEMBERSHIP IMPACT



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

BREAKING THE CYCLE OF POVERTY



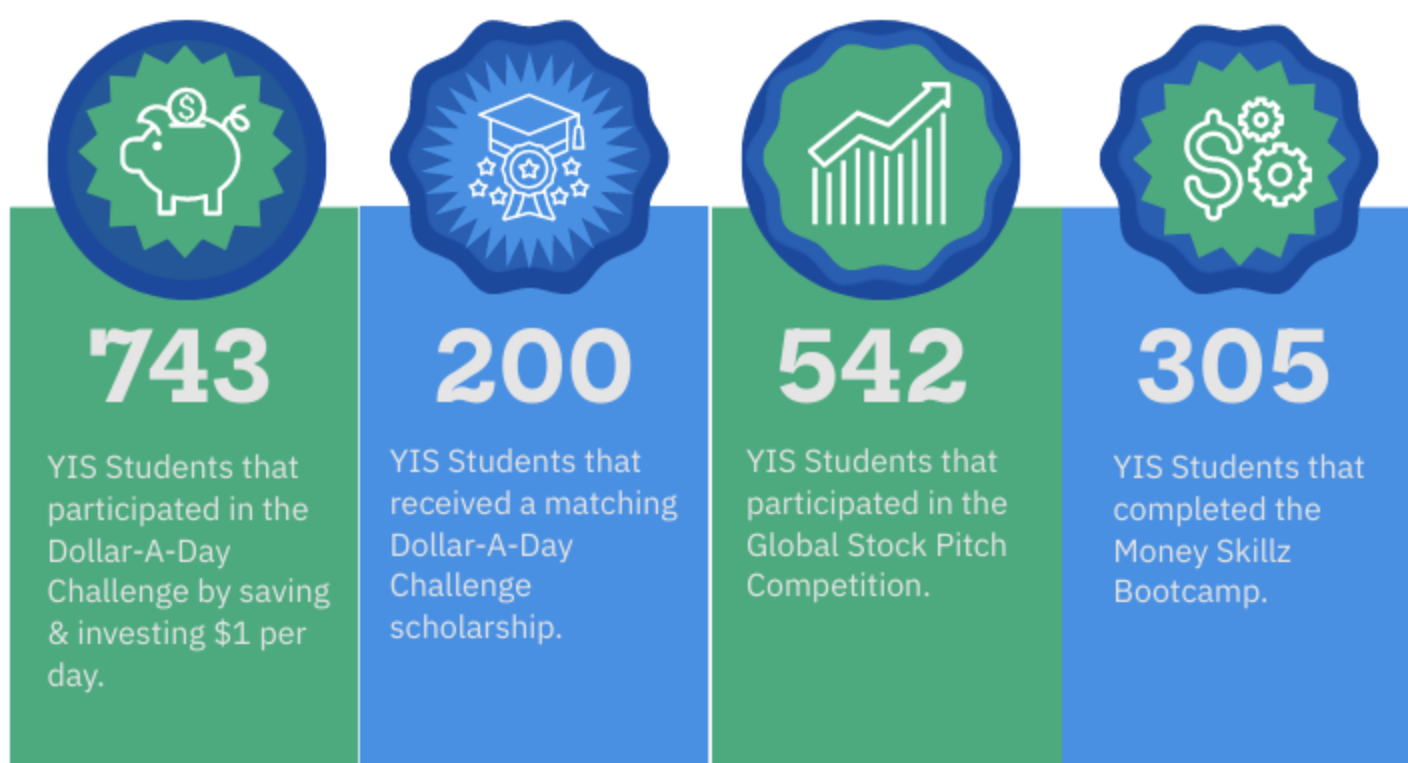
93% of YIS students can pass a basic financial literacy test.

INVESTORS CAN CHANGE THE WORLD



YIS serves students in 46 U.S. states & 80 countries across the world.

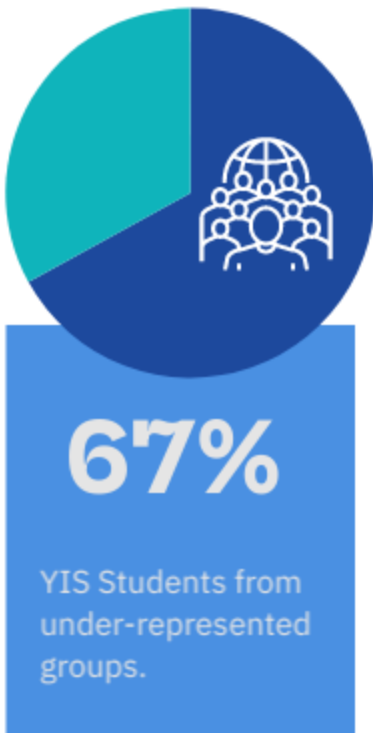
PROGRAM IMPACT



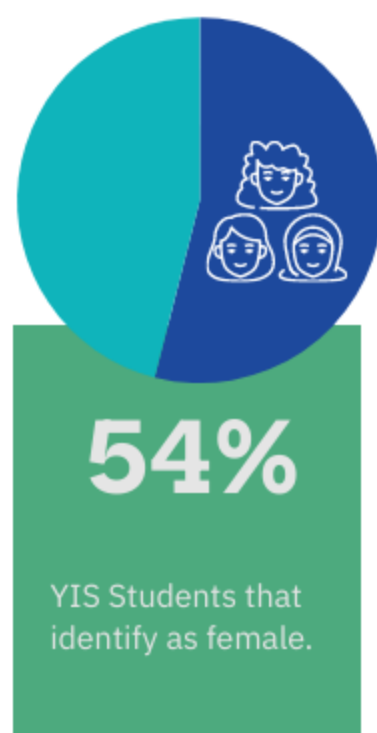
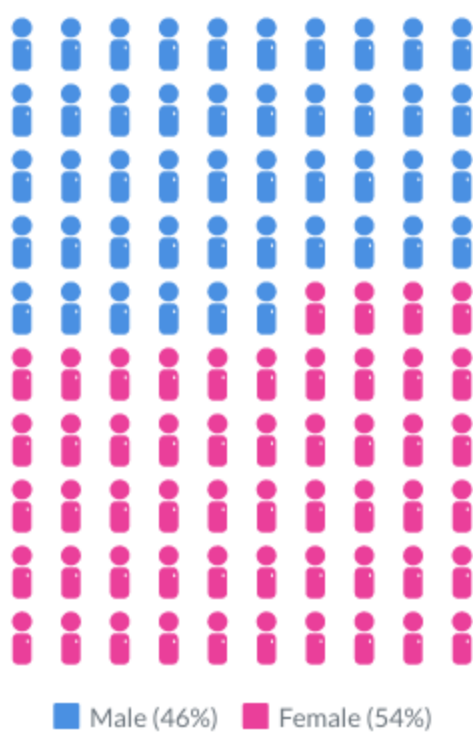
The Young Investors Society Access Initiative

The YIS Access Initiative provides access to FREE, quality, financial literacy education, mentorship, STEM career education, and scholarships to a variety of talented students in under-resourced communities.

21% of all YIS students are served through the Access Initiative



Encouraging Under-Represented Groups in Finance:



Encouraging Women in Finance:

"YIS is an exceptional journey from high school economics to real-world finance. Bridging theory and practice, YIS fosters a community of curiosity and collaboration, which propels students to communicate and collaborate effectively."

~ Sujay K. Basis Scottsdale, Arizona

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