



YOUNG
INVESTORS
SOCIETY



Young Investors Society
Annual Report
2024-2025

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



Steve Barrus

Vice President
Financial Consultant
Advisory Group for Life



Jane Winslow

Treasurer
Senior Vice President
Merrill Lynch (Retired)



Oliver Daley

Secretary
Sales Manager
Midwest, Americas
Bloomberg

Board Members

Patricia Ball

Chief Operating Officer
Ethos Investment Management

John Bowman

Chief Executive Officer
CAIA Association

Claudio Brocado

Head of Global Equities
Nuclo Independent CIO

Lucy Chuah

Investment Analyst
GQG Partners

Morgaine Conway-Grim

Founder
Hawks & Doves

Andrew Davis

Independent Financial Advisor
WealthSource Partners

Andrew Dougherty

Board Member
Young Investors Society

Laura Geritz

Chief Executive Officer
Rondure Global Advisors

Bryan Jack

Chief Financial Officer
First Community Bank-Utah

Lee Mackay

Partner at Nevers, Palazzo, Packard,
Wildermuth & Wynn

Vielcka Mansukhani

North America Head of Equity Sales/Latin
America Institutional Equity Sales
Bradesco BBI

Rowe Michels

Managing Director at Kimberlite-Alpheus
Fund I

Dave Miles, CFA

Research Analyst
Fidelity Investments

Mark Van Cott

Board Member
Young Investors Society

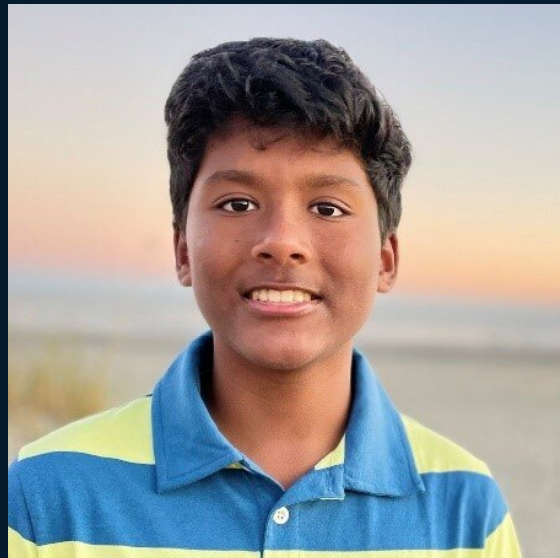
Liz Su

Lead Portfolio Manager of EM strategies
Boston Common

Christine Tobin

Chief Operating Officer
Young Investors Society

Student Advisory Board



Elected Officers

President: Mahanth K: Middlesex Academy, NJ

West Coast VP: Christiana S: Mt. Everest Academy, CA

East Coast VP: Aubrey M: Langley High School, VA

Mid-West VP: Ronan M: 605 Academy, SD

International VP: Isabella Z: Marymount, Columbia

Secretary: Aneesh S: NC School of Science, NC

Social Media Team Leader: Isaac C: Middlesex, NJ

Director of Communications: Shane L: Crossroads School, CA

Members-At-Large

East Coast

Teniola T: Winston Churchill High School, MD

Sabrina M: The Hewitt School, NY

Jay S: Ardrey Kell High School, NC

Amy L: Northwest High School MD

Arin W: Great Valley High School, PA

Athithya G: Hillsborough High School, NJ

Brody B: James Madison High School, VA

Abhinav P: Cox Mill High School, NC

Eshan K: Cox Mill High School, NC

Daniel C: American Heritage School, FL

Alexander P: Edison Academy Magnet School, NJ

Sean R: Ethical Culture Fieldston School, NY

Nivaen G: South Windsor High School, CT

Aayan R: South Windsor High School, CT

Kevin S: Thomas Jefferson High School, VA

Michael D: Houston County High School, GA

Deeta S: West Windsor Plainsboro North High School, NJ

Jocelyn Y: Richard Montgomery High School, MD

Vyom M: American Heritage Broward, FL

Wesley G: Delbarton School, NJ

Tanush P: Cox Mill High School, NC

Adithya P: Langley High School, VA

Meiling R: American Heritage Schools, FL

Matias L: Ridgewood High School, NJ

Kevin Z: Livingston High School, NJ

Aarush J: Cox Mill High School, NC

Aaditya M: Middlesex County Academy, NJ

Nilay M: North Allegheny Senior High School, PA

Xander S: Basis DC, Washington D.C

Rithvick K: Marvin Ridge High School, NC

Rithik C: Montgomery High School, NJ

Nikita K: Bridgewater-Raritan High School, NJ

Neil G: Cox Mill High School, NC

Vedant S: Germantown Friends School, PA

Leon H: Germantown Friends School, PA

Eshan D: Cox Mill High School, NC

Neel D: American Heritage School, FL

Prakrit S: Watchung Hills Regional High School, NJ

Rushil K: Steinbrenner High School, FL

Agastya C: Edison High School, NJ

Saad S: South Windsor High School, CT

Vedant P: FISO, FL

Sai V: FISO FL

Edward C: Livingston High School, NJ

Sampreetha S: Sharon High School, MA

Michael S: Glenelg High School, MD

Emily S: Glenelg High School, MD

Atharv G: Orlando Science High School, FL

Amogh R: Orlando Science High School, FL

Anjali P: Garnet Valley High School, PA

Members-At-Large Continued

Mid-West

Zoya S: Westlake High School, TX
Kayla W: Gateway Academy, AR
Bryan M: BASIS Chandler, AZ
Aaron E: Mounds View High School, MN
Kalan K: BASIS Chandler AZ
Parnian E: Obra D. Tompkins High School, TX
Agamy V: Coppel High School, TX
Sowmya V: Rock Hill High School, TX
Ronit M: Dulles High School, TX
Vedant B: Independence High School, Texas
Jacklin W: Memorial High School, Texas
Devan P: Basis Scottsdale, AZ
Beatriz G: Michael E. DeBakey High School, TX
Riley G: Loveless Academic Magnet Program, AL
Danielle P: Phoenix Country Day School, AZ
Tarun V: Rouse High School, TX
Juna M: Woodhaven Highschool, MI
Jinay S: Wakeland High School, TX
Rushil S: McNeil High School, TX
Ansia S: Woodhaven High School, MI
Suraj M: Dulles High School, TX
Grant W: Mounds View High School, MN
Varun V: Canton High School, MI
Ritvik M: Dulles High School, TX
Murari A: Westlake High School, TX

West Coast

Kimi Z: Crean Lutheran High School, CA
Emme H: Diamond Bar High School, CA
Conrad K: Bellevue High School, WA
Abby M: Menlo-Atherton High School, CA
Jonathan T: Westlake High School, CA
Ashwit M: Basis Independent Silicon Valley, CA
Maxwell H: Diamond Bar High School CA
Karlina M: Carondelet High School, CA
Kelsey M: Basis Independent Silicon Valley, CA
Hrishik G: American High School, CA
Longford T: Lowell High School, CA
Aadit A: North Creek High School, CA
Krish S: Amador Valley High School, CA
Caroline C: Irvine High School, CA
Dhanya G: Basis Independent Fremont, CA
Gretchen G: Dunn School, CA
Palash D: International School of Bellevue, WA
Nimalan V: Glacier Peak High School, WA
Arjun R: Lake Oswego High School, OR

International

Nehan R: Sydney Grammar School, Australia
Alaric C: Churchill High School, Canada
Aryan S: St. George's School, Canada
Kristal M: Del Valle Gómez Instituto Guatemalteco Americano, Guatemala
Aanya G: Pathways School Noida, India
Shaurya K: Amity International School, India
Ankush C: Central Board of Secondary Education, India
Angela C: Yokohama International School, Japan
Shehryar H: Cadet College Hasanabdal, Pakistan
Luke C: Tonbridge School, United Kingdom
Harry B: British International School of Ho Chi Minh City, Vietnam

Letter from YIS Founder & President, James Fletcher, CFA



Happy 10 Year Anniversary to Young Investors Society!

It was a special moment for me at the YIS Gala in May in NYC, to show pictures that tell the story of key YIS milestones over the past decade. From those first stock pitch competitions a decade ago where a shabby YIS banner was hung in a high school in California, to those first teacher conferences, to the international growth, to where we are today hosting 280 students and 120 volunteers in NYC at the Summit in a best-in-class teen conference and now reach over 3,000 high schools around the world. It is quite remarkable to look back on all of the progress and the growth!

I believe this year was a year of celebration for YIS, and also a year of the springboard into the future.

It's a year of celebration, because there is so much to be proud of. Led by the team of Christine, Maria, and Diana, we achieved great success this year. We end the year with 3,013 schools in 100 countries, and most importantly, saw the engagement levels rise in key areas such as more lessons completed, we nearly doubled the amount of students we hosted at GYIS to 280, participation in the Dollar-a-Day Challenge grew, and Stock Pitch Submissions grew to 644. We continue to hear story after story of the life-changing impact that YIS has on teens around the world. Our community of volunteers and corporate sponsors continues to grow. This is reason to celebrate!

It is also a time for springboarding YIS into the future. We are excited to announce the hiring of a full-time Executive Director for YIS, a true sign that YIS is ready to grow to the next level. We continue to make the Access Initiative more impactful, adding focused workshops and competitions to the GYIS this year. We continue to grow internationally and throughout the US, aided by the new mentoring program, which was piloted in 2024 and experienced great student and teacher feedback and we are preparing the foundation of the organization to get to the point where we can serve thousands of kids in person per year at GYIS and impact tens of thousands of active students each year through our programs.

As exciting as this growth is, we must always stay true to our values. We might not be the biggest, but we should always stay the best and the kindest organization out there teaching finance to kids. The connections we build between teens and financial professionals have been so impactful, the students can feel how much we care, and this should always be the case even as we grow.

I'm so excited for what the 10 years will bring. And more than anything, I am just so GRATEFUL! Grateful for the YIS team, the board, and advisory board members, for all the volunteers and corporate sponsors who have given their time to the organization over the past decade. We couldn't do this without each and every one of you!

Here's to the next decades of investors changing the world!

James Fletcher
Young Investors Society
Founder & President

Letter from YIS Chief Operating Officer, Christine Tobin



This year has been marked by tremendous progress, innovation, and meaningful growth. Young Investors Society proudly achieved over 100% of our membership and program goals for the 2024–2025 year, exceeding targets for total schools, student registration, and Dollar-A-Day Challenge participants.

With YIS now active in 47 states and over 100 countries, we are seeing the powerful global impact of our work. One of the most inspiring milestones of the year was hosting our second Global Youth Investment Summit, which engaged over 250 high school students from around the world. Our Access Initiative also saw significant expansion, now supporting 18% of all YIS students, a major step forward in our mission to ensure equity and access in financial education.

We continued to elevate student engagement through new programming, including Fireside Chats, where students hear personal stories and career advice from leading industry professionals. The response has been overwhelmingly positive, with students expressing how valuable it is to connect directly with finance leaders and mentors.

The Dollar-A-Day Challenge program expanded meaningfully this year, with the addition of a personal finance quiz and new monthly application windows, resulting in a 70% increase in participation. In support of our commitment to financial empowerment, we almost doubled the number of scholarship matches, awarding scholarships to 386 students through this program.

We are especially grateful for the incredible support at our 10-year anniversary gala, which welcomed over 200 attendees and received generous contributions from leading investment firms, including Bloomberg, Oaktree Capital, First Eagle, Grandeur Peak, PIMCO, and Invesco. The continued commitment of our YIS Boards, donors, and corporate partners remains the driving force behind our growth and impact.

As part of our ongoing commitment to enhancing our digital infrastructure, we have laid the groundwork for implementing a new reporting engine using Metabase. Efforts focused on improving the identification and tracking of Access Initiative students, with various data capture and reporting solutions. This upgrade will enhance our user experience, improve data capture capabilities, and allow us greater control and flexibility in managing our content, positioning us for greater scalability in the years ahead.

As we reflect on this past year, it is clear that 2024–2025 has been a year of strategic growth, deepened commitment, and impactful engagement. I am sincerely grateful to our YIS Board, Regional Advisory Boards, Committees, and Executive Leadership Team for their dedication, energy, and vision.

Together, we have built a powerful foundation for the future, one where every high school student has access to free, high-quality financial education.

Christine Tobin
Young Investors Society
Chief Operating Officer

THE WORK THAT WE DO

MEMBERSHIP IMPACT



3,013

SCHOOLS



16,455

STUDENTS
*est.



1,182

TEACHERS

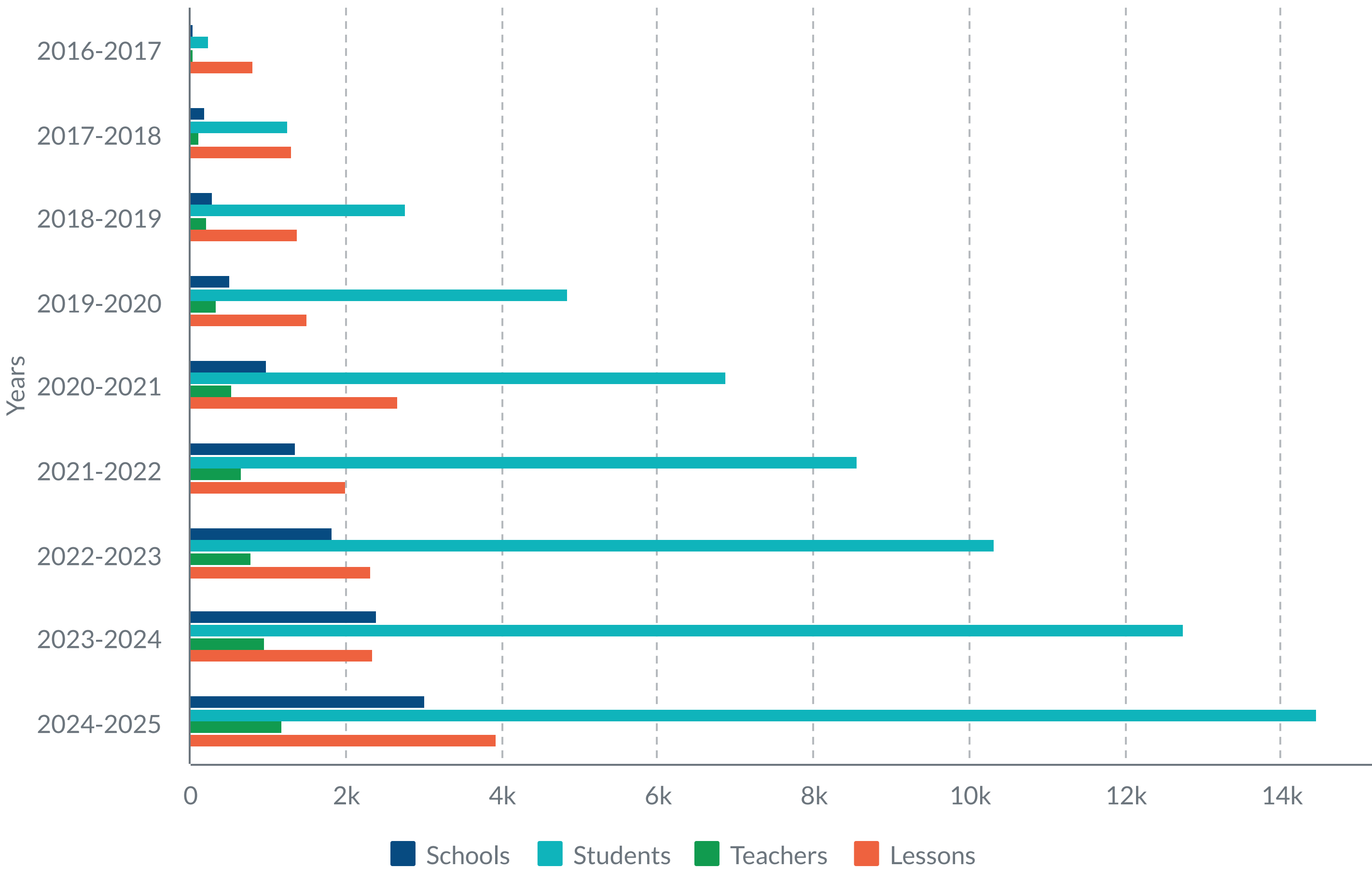


18,260

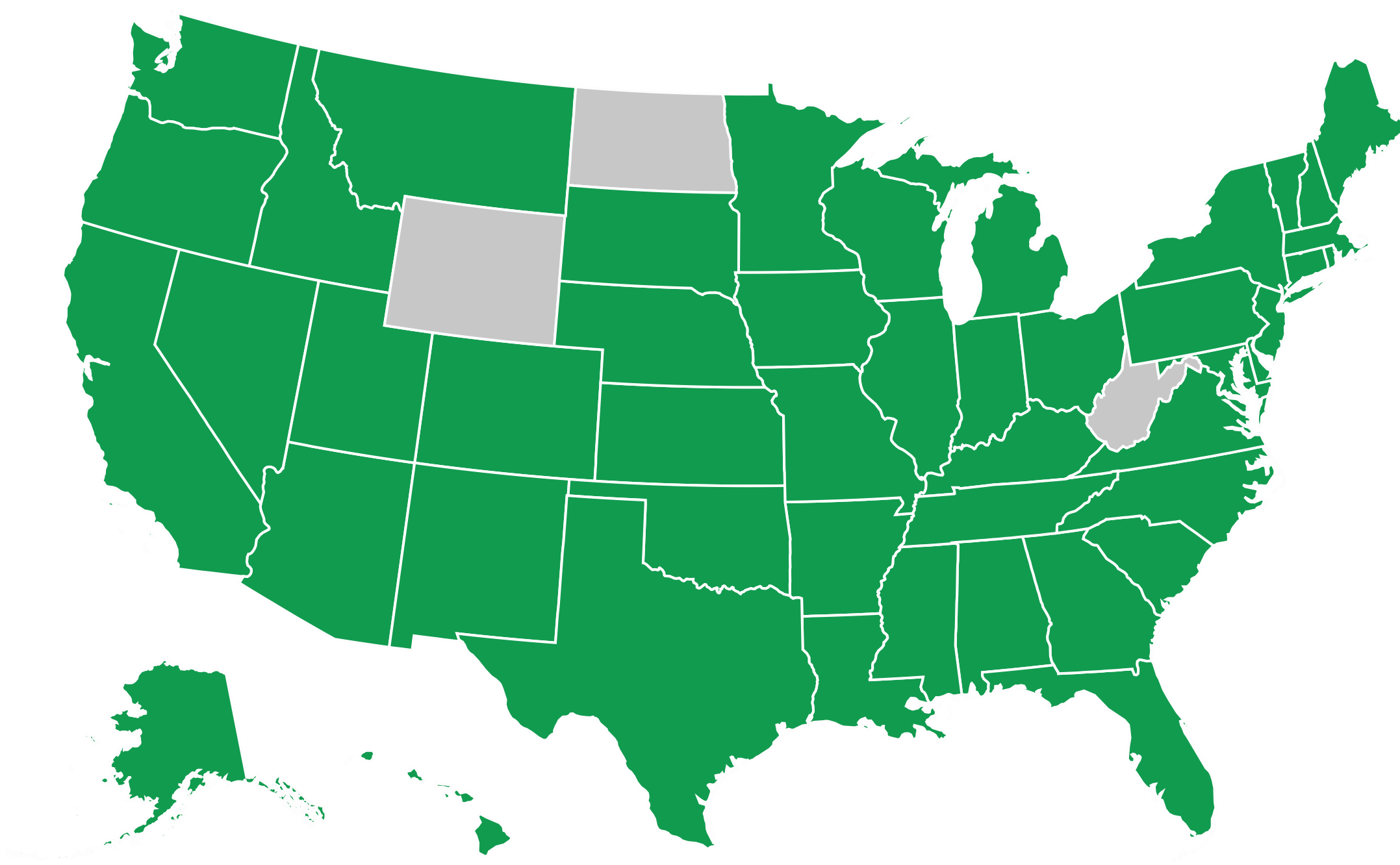
LESSONS
COMPLETED

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

Membership Metrics



YIS SCHOOLS ACROSS THE UNITED STATES

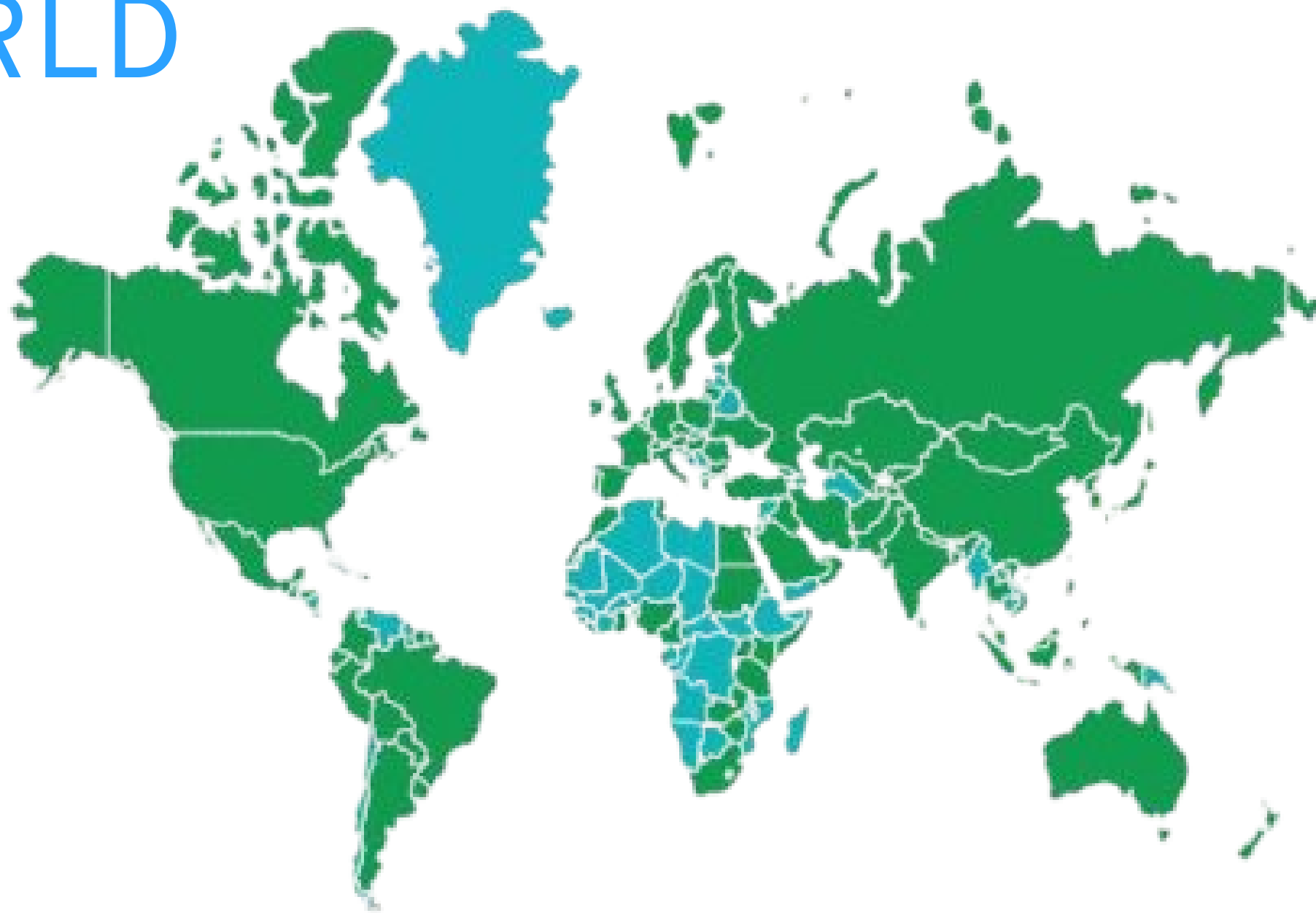


47 U.S. States

Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
Florida
Georgia
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi

Missouri
Montana
Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
Ohio
Oregon
Oklahoma
Pennsylvania
Rhode Island
South Carolina
South Dakota
Tennessee
Texas
Utah
Vermont
Virginia
Washington
Wisconsin

YIS SCHOOLS ACROSS THE WORLD



100 Countries

Africa	Germany	Mexico	Somalia
Argentina	Ghana	Mongolia	South Africa
Australia	Greece	Morocco	South Korea
Austria	Guam	Nepal	Spain
Bahrain	Guatemala	Netherlands	Sri Lanka
Bangladesh	Honduras	New Zealand	Suriname
Belgium	Hong Kong SAR	Nigeria	Sweden
Bolivia	Hungary	Norway	Switzerland
Brazil	India	Oman	Swaziland
Bulgaria	Indonesia	Pakistan	Taiwan
Canada	Ireland	Panama	Tajikistan
China	Israel	Paraguay	Tanzania
Colombia	Italy	Peru	Thailand
Costa Rica	Jamaica	Philippines	Trinidad/Tobago
Croatia	Japan	Poland	Tunisia
Cypress	Jordan	Portugal	Turkey
Czech Republic	Kazakhstan	Puerto Rico	United States
Denmark	Kenya	Qatar	Uganda
Dominican Republic	Kuwait	Romania	Ukraine
Ecuador	Kyrgyzstan	Russia	Uruguay
El Salvador	Liberia	Rwanda	Uzbekistan
England	Lithuania	Saudi Arabia	Vietnam
Egypt	Luxembourg	Scotland	Wales
Finland	Malaysia	Singapore	Zambia
France	Mauritius	Slovenia	Zimbabwe

YIS MEMBERSHIP

Number of Total Schools: 3,013

United States: 2,238

Asia: 372

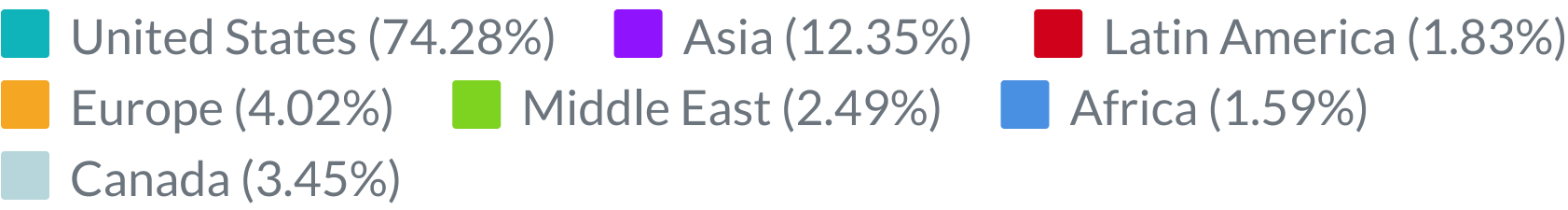
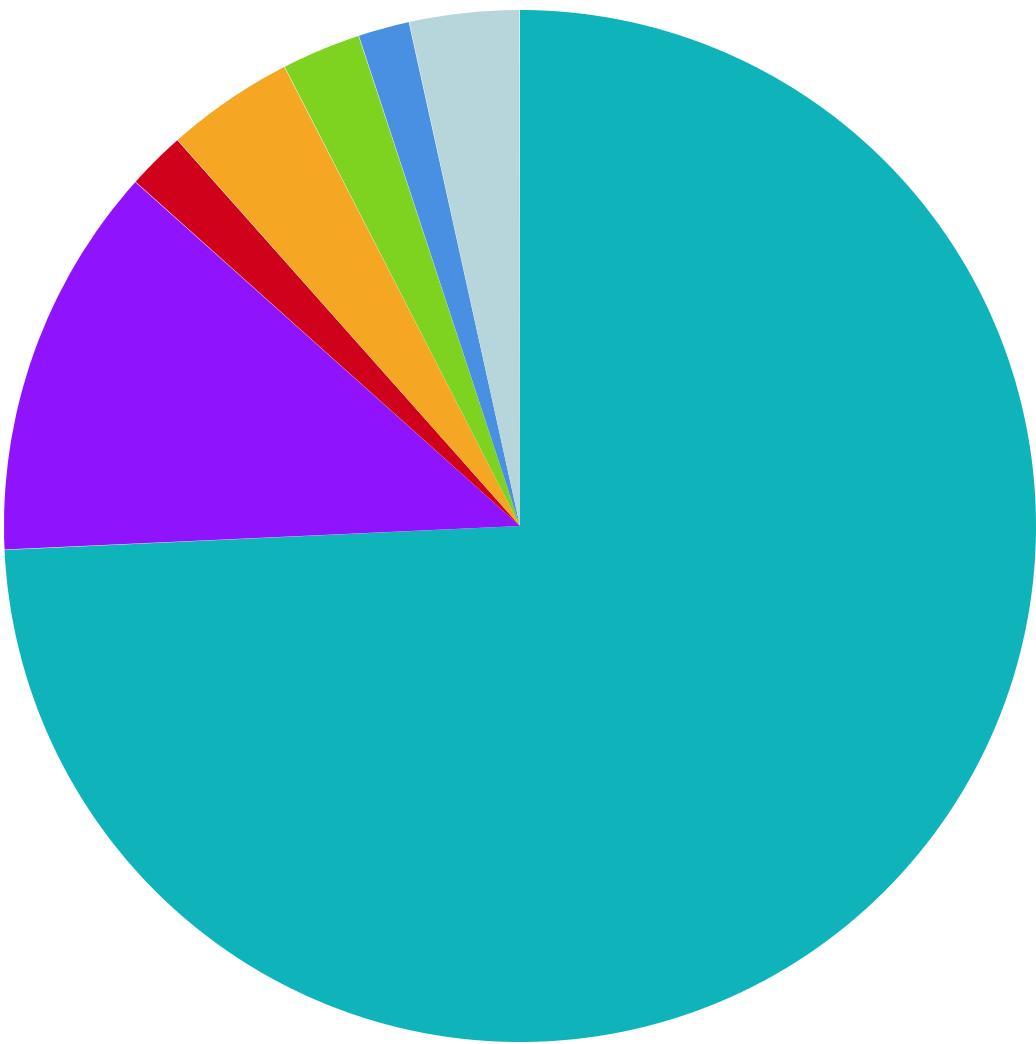
Europe: 121

Canada: 104

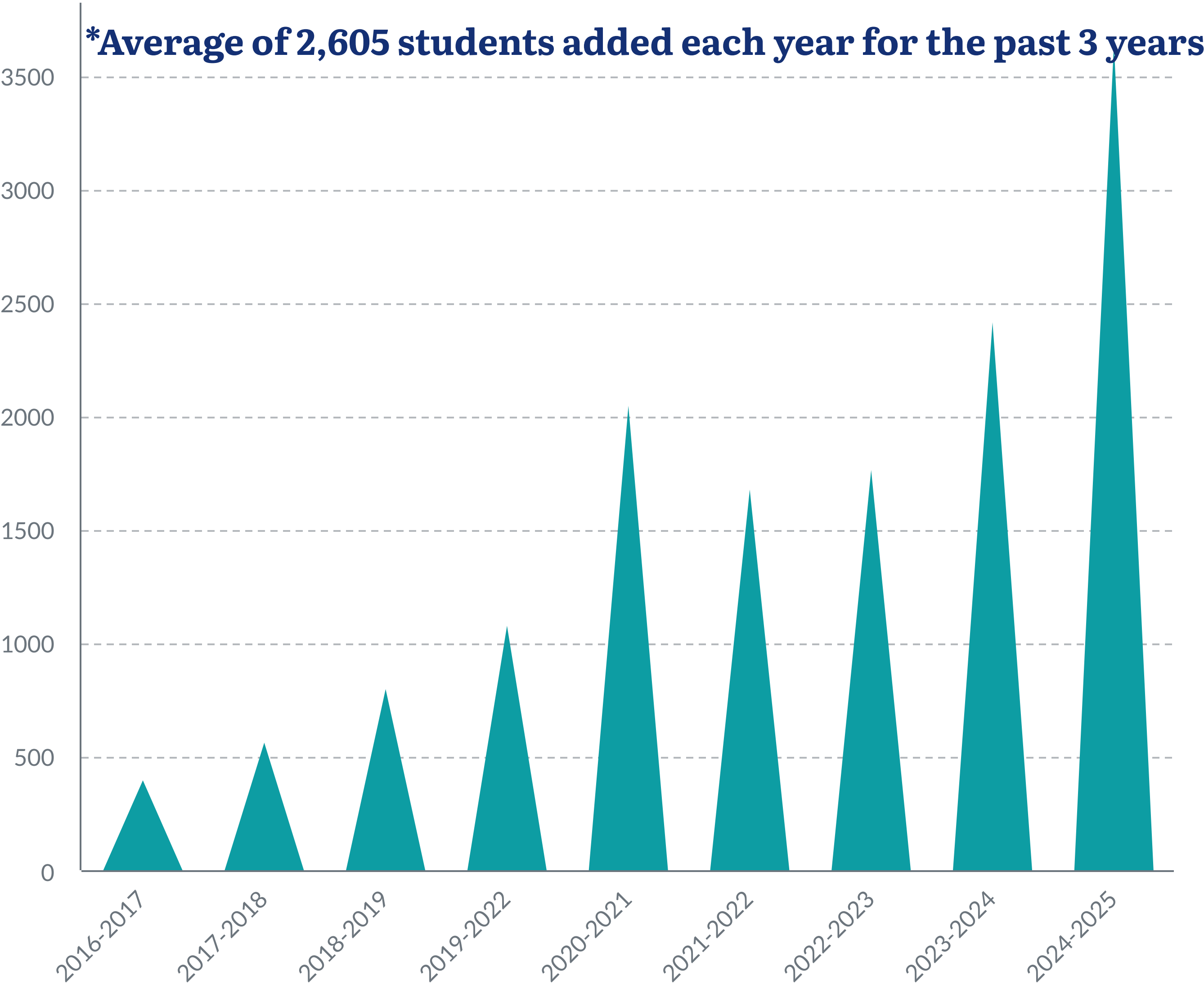
Middle East: 75

Africa: 48

Latin America: 55

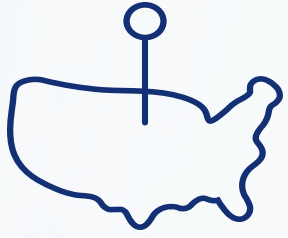


Number of New Students in 2024-2025 School Year: 3,640





327+
SCHOOLS

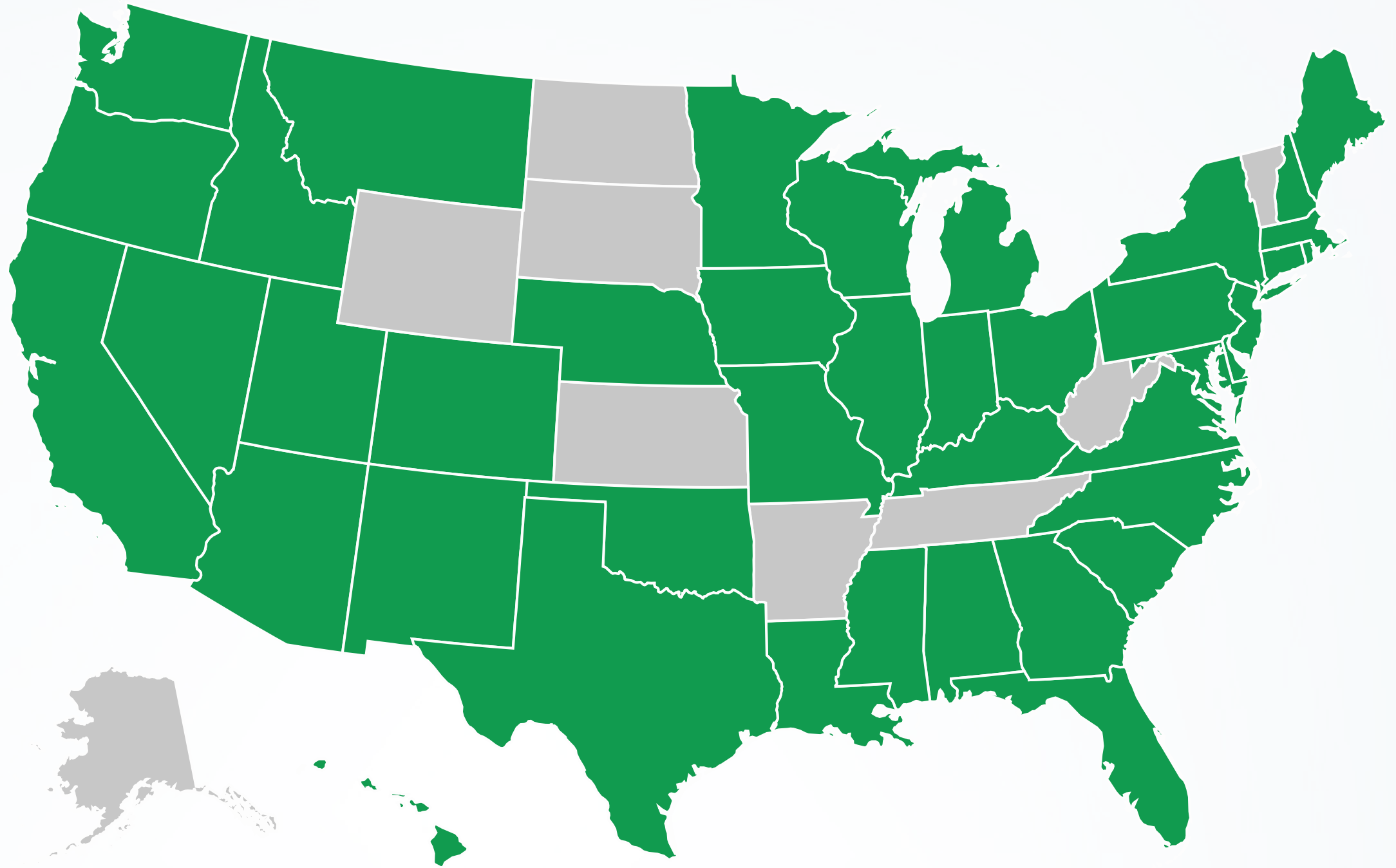


41
STATES



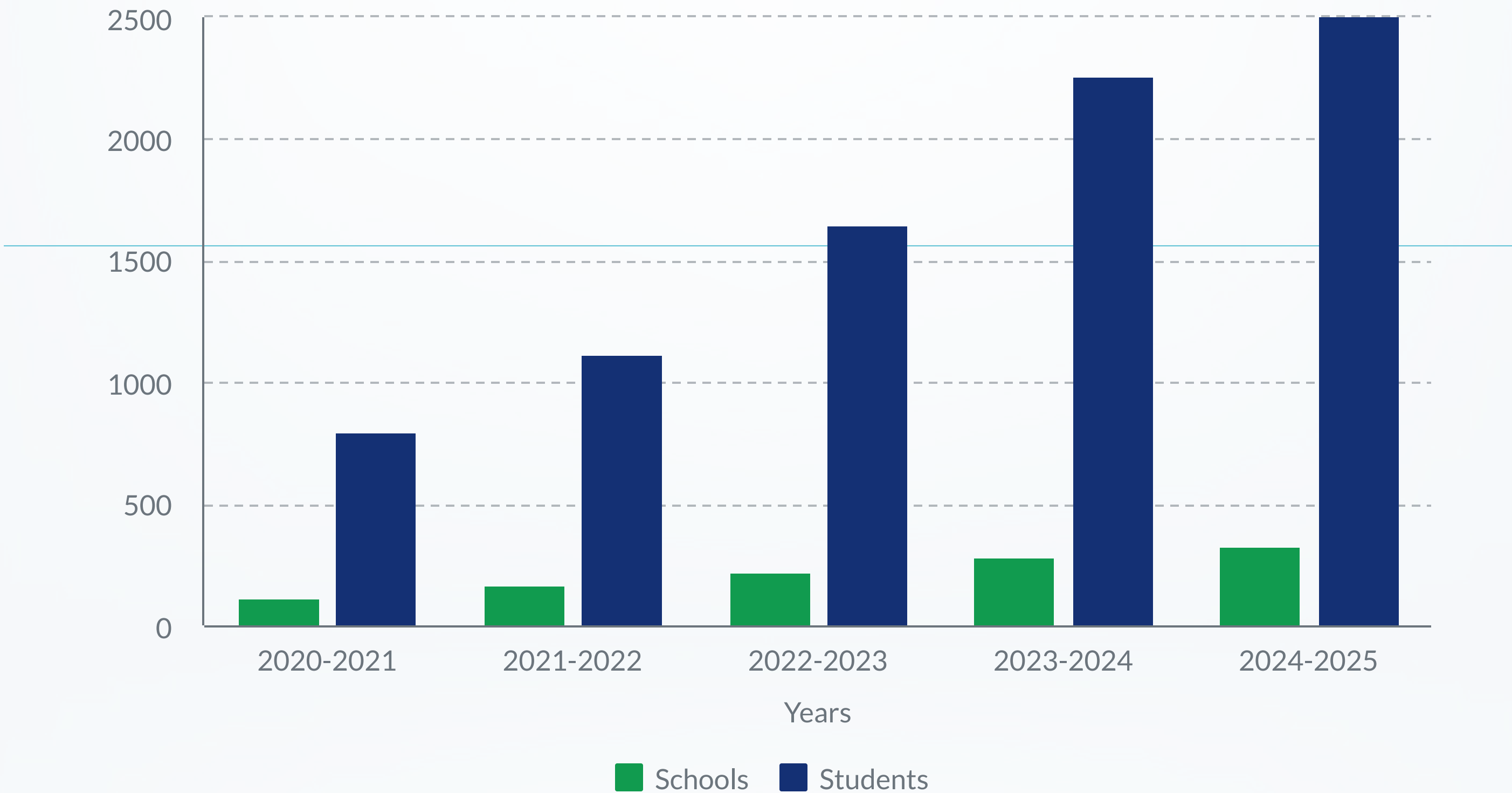
18%
STUDENTS
SERVED

YIS ACCESS INITIATIVE



The YIS Access Initiative is making a powerful impact, reaching **2,584 students** across **327 schools in 41 states**, and representing approximately **18% of our entire Young Investors Society student base**. This year, the program experienced an **impressive 18% growth**, supported by a growing network of **19 dedicated Community Access Partners** who help bring financial literacy education to underserved communities nationwide.

Access Initiative



THE WORK THAT WE DO

PROGRAM IMPACT



KNOWLEDGE BOWL

345



DOLLAR-A-DAY
CHALLENGE

1,263



DOLLAR-A-DAY
SCHOLARSHIPS

386



MONEY SKILLZ
BOOTCAMP

390



STOCK PITCH
COMPETITION

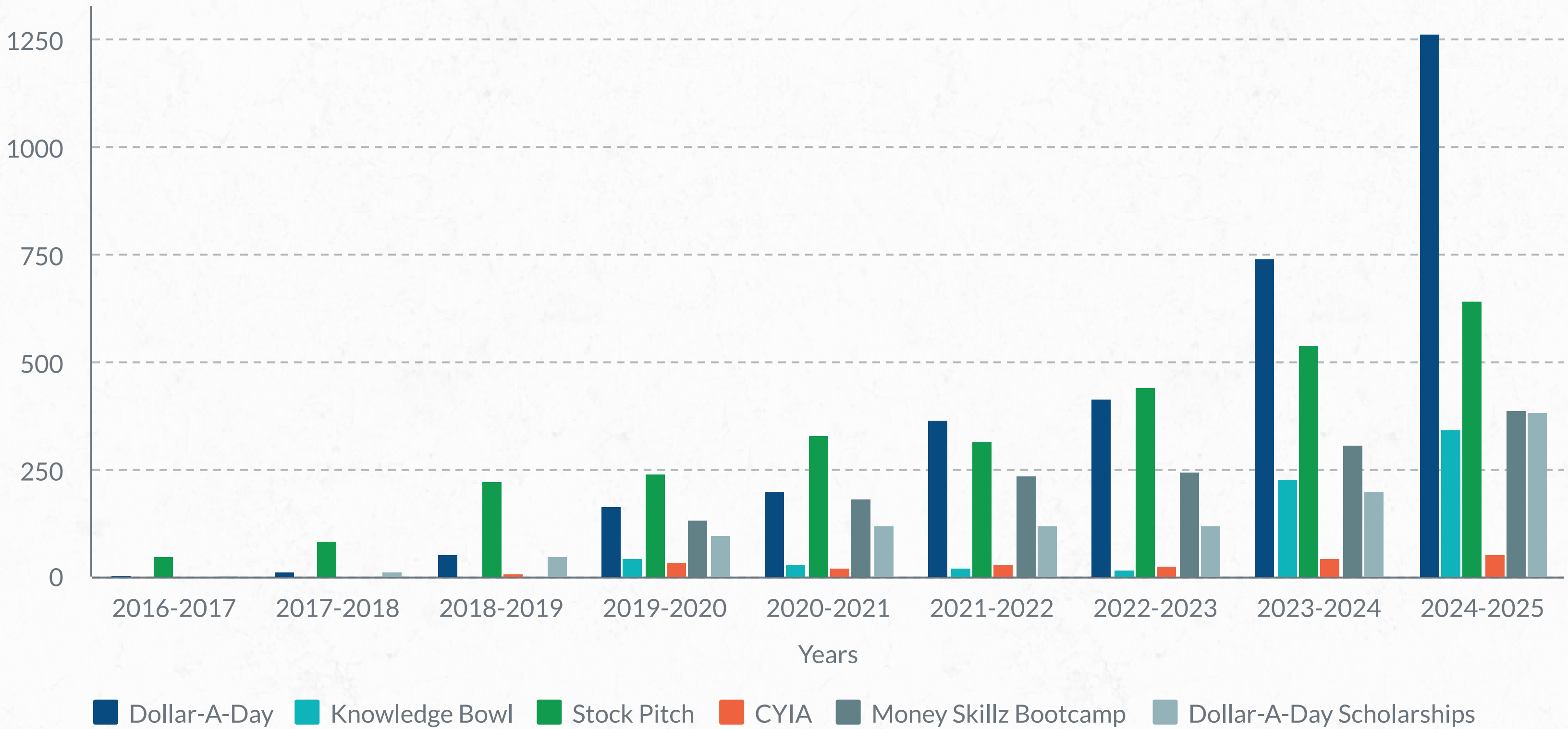
644



CYIA
DESIGNATION

54

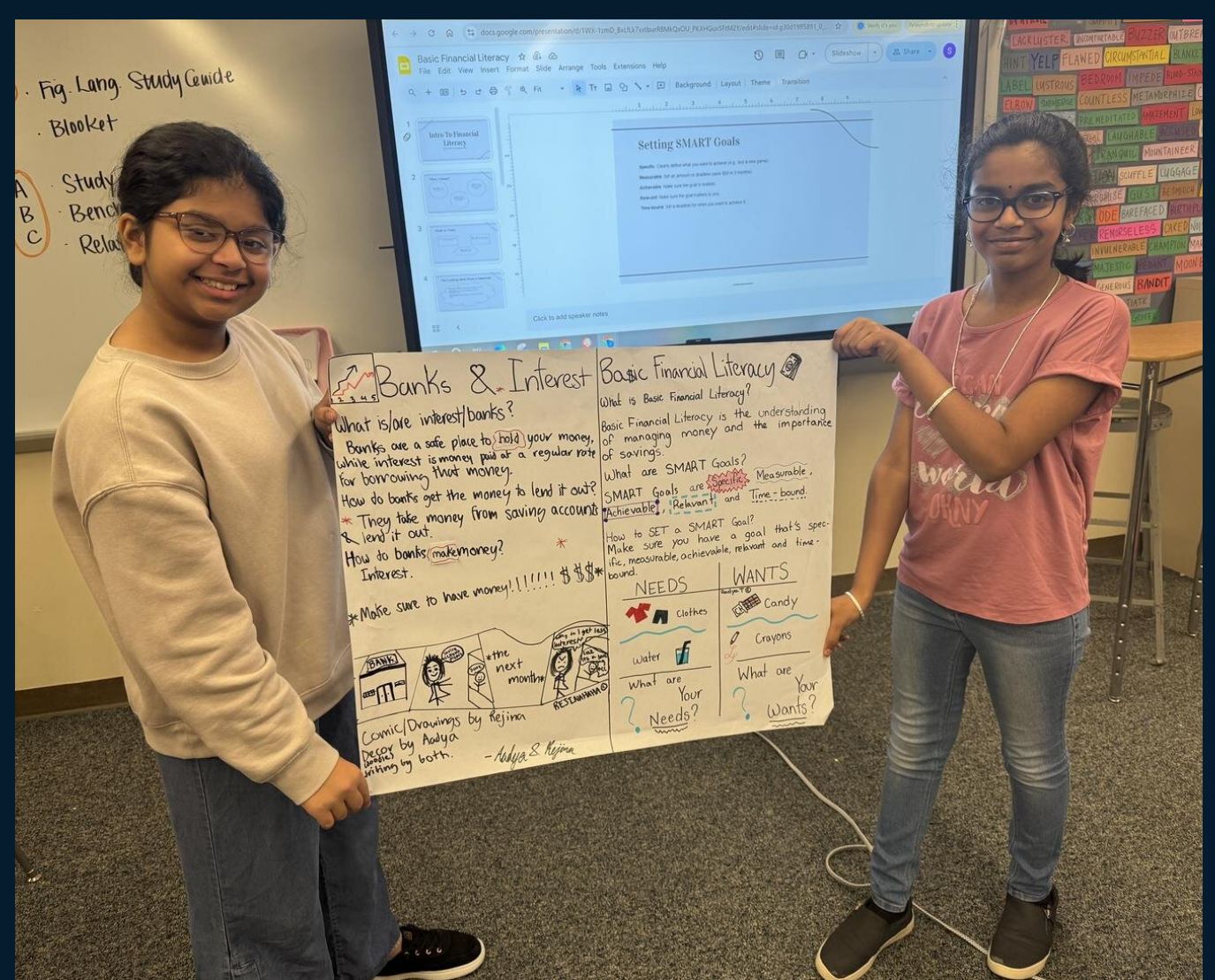
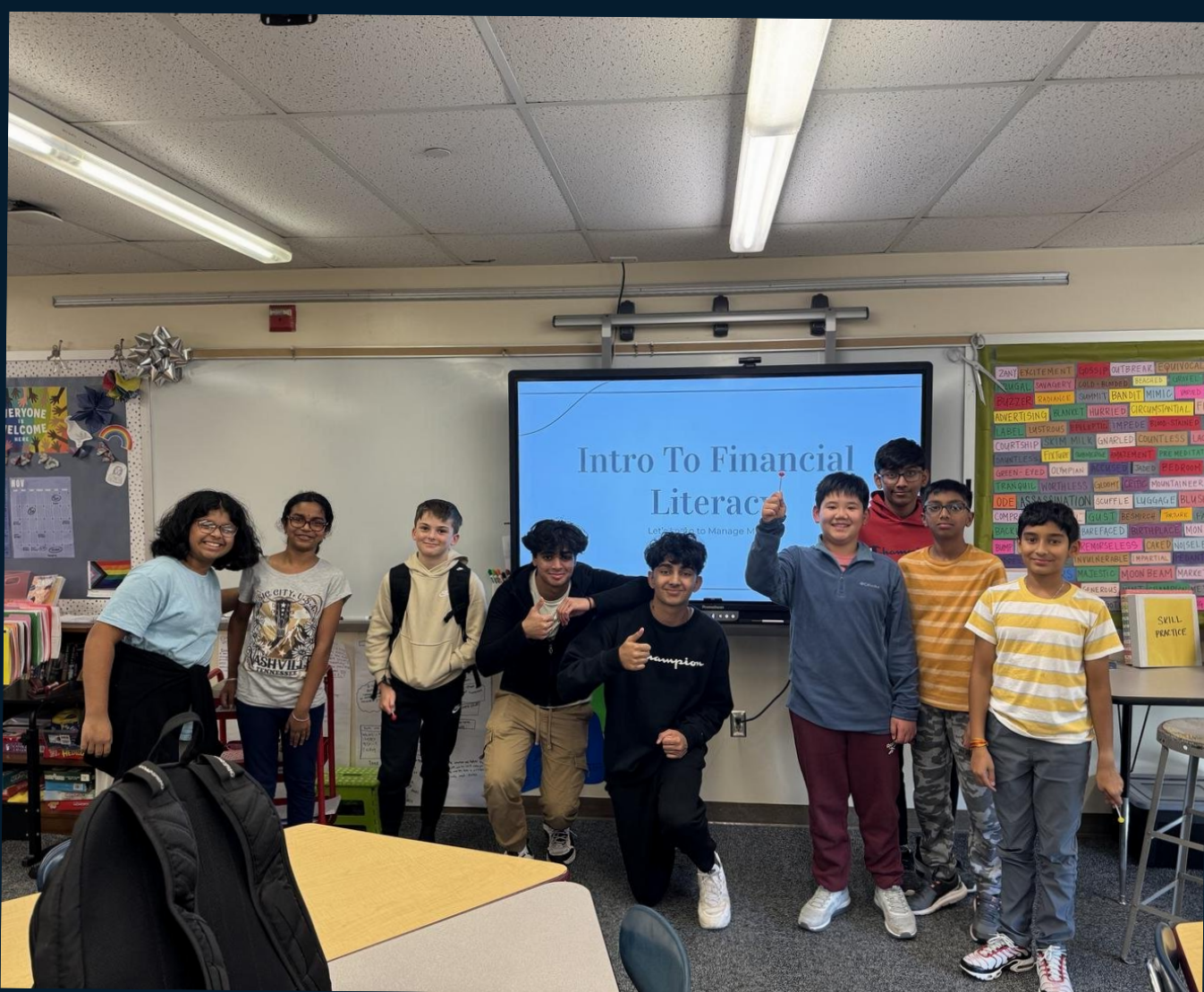
Program Metrics



2024-2025 Program Highlights Community Champions



The Allen, TX Chapter of Young Investors Society, led by President Temi O, hosted a Finance4Littles workshop to teach elementary students (K-5) the basics of budgeting, saving, and distinguishing needs vs. wants through fun, hands-on activities. In support of the event, the chapter held a pickleball fundraiser, raising over \$200 to help fund the workshop and future initiatives. The event reflected the chapter's ongoing dedication to making financial literacy accessible and engaging for students of all ages.



YouThrive, a student-led financial literacy program founded by Aayan R., a high school senior and YIS student from South Windsor, CT, recently completed a successful 6-week series teaching elementary students core money skills through interactive games and activities. The program was well-received, with many students eager for its return. Aayan launched YouThrive to promote financial literacy, business ethics, and investing among youth, with a mission to empower the next generation through engaging, hands-on education.

2024-2025 Program Highlights Stock the Shelves



Tolland High School YIS Club
Connecticut



Cox Mill High School YIS Club
North Carolina

For the fifth consecutive year, the Tolland High School YIS Club has surpassed its donation goals in the YIS Stock the Shelves Food Drive.

In December 2024, the club partnered with the THS Student Council to raise over \$500.00, collecting more than 600 canned and pre-packaged food items for the Cornerstone Food Pantry in Rockville, CT. Their continued dedication to community impact reflects the values of service and leadership at the heart of the Young Investors Society.

The Cox Mill High School YIS Club also participated in raising needed items totaling over 200 lbs of food for local food banks in Carrabus County, NC.

YIS Finance Knowledge Bowl

The 2025 YIS Finance Knowledge Bowl brought together 344 high school students for a virtual competition testing their personal finance and investing knowledge. The top 22 finalists advanced to the Analyst for a Day Finals, showcasing their skills in real-world financial analysis. The event continues to inspire students through engaging, competitive learning.



Finance Knowledge Bowl Winners

1st Place: Athithya G: Hillsborough High School, NJ

2nd Place: Tanush P: Cox Mill High School, NC

3rd Place: Maxwell H: Diamond Bar High School, CA

YIS Fireside Chat

YIS Fireside Chats are engaging virtual events where finance and business professionals from a variety of fields share their personal stories, career journeys, and insights with YIS high school students. These sessions provide a unique opportunity for students to explore potential career paths in finance and investing, while participating in interactive Q&A sessions that allow them to ask questions and gain valuable advice directly from industry experts.



Fall 2024

Morgaine Conway-Grim: CEO and Founder of Hawks & Doves

Liz Su: Lead Portfolio Manager of Sustainable Emerging Market Equities at Boston Common



Winter 2024

Susan Kempler: Managing Director, Portfolio Manager at Nuveen

Ken D'Souza: Managing Director and Portfolio Manager at PGIM Quantitative Solutions

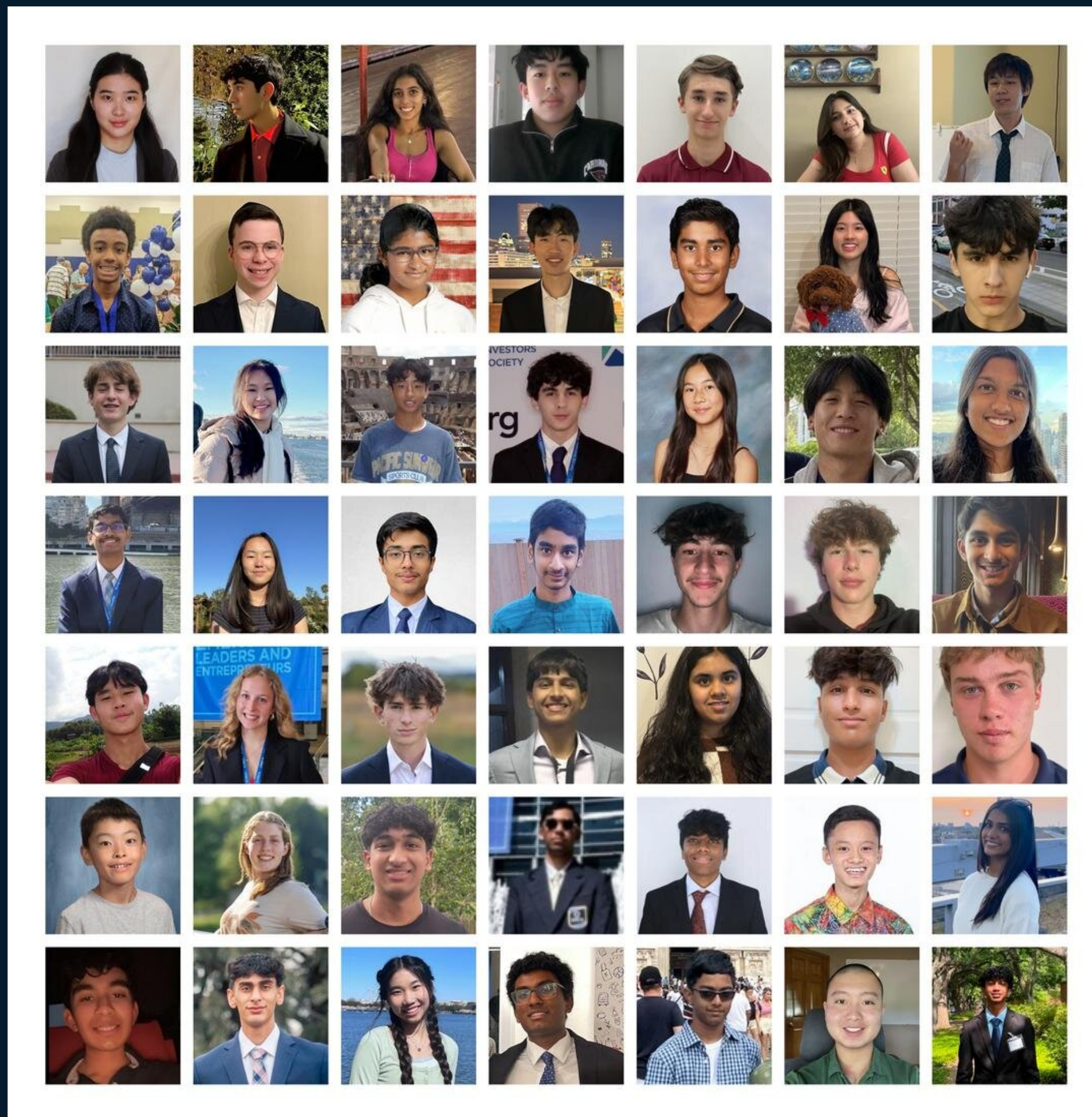


Spring 2025

Priya Prasad Bowe: Head of Sustainability at Oaktree Capital Management

Shayne Arcilla: Senior Analyst (VP) – Natural Resource Equities at Cohen & Steers

YIS Dollar-A-Day Challenge



The newly enhanced YIS Dollar-A-Day Challenge was designed to accommodate a growing number of participants, allowing students to apply on a rolling, monthly basis.

As part of the application process, each student completed a personal finance quiz to determine eligibility.

This year, 1,263 students participated in the Challenge, and 386 students were selected to receive the Dollar-A-Day Money Match Scholarship for the 2024–2025 school year.



YOUNG
INVESTORS
SOCIETY



DOLLAR-A-DAY
CHALLENGE

“

" I bought Micro Strategy (MSTR)...and I have already made some profit!

The Dollar-A-Day Challenge keeps me motivated to keep investing and saving money."

~Constantin W.
Dunecrest American School, Dubai



”

Bloomberg Your Path, Your Future Networking Event



We were thrilled to kick off the 2024–2025 Global Youth Investment Summit with an incredible Your Path, Your Future event, generously hosted by Bloomberg. Students had the unique opportunity to tour Bloomberg's headquarters, experience a live demonstration of the Bloomberg Terminal, and attend an engaging panel discussion featuring industry professionals. The event also offered valuable networking time, allowing students to interact directly with a wide range of finance experts and gain firsthand insight into careers in the investment industry. Students expressed great enthusiasm for the experience, calling it a tremendous opportunity to learn, connect, and be inspired by leaders in the field.



JP Morgan Career Exploration Event



Young Investors Society was honored to partner with J.P. Morgan for an inspiring and impactful Career Exploration Event, offering students an inside look at careers in finance.

The event opened with a networking mixer, where students connected with young professionals and gained valuable advice and real-world perspectives. A panel of new investment analysts then shared their personal career journeys and insights into the financial industry, followed by remarks from a J.P. Morgan recruiter on internship opportunities and application tips.

We are sincerely grateful to J.P. Morgan for their support in empowering the next generation of financial leaders.



Global Youth Investment Summit



The 2025 Global Youth Investment Summit was an unforgettable two-day experience, hosted at the Cornell Tech campus on Roosevelt Island in New York from May 29–30. The event featured finance workshops, panels, networking sessions, personal finance games, a case study competition, and the highly anticipated Global Stock Pitch Competition. Over 250 students from 24 states and 5 countries participated, including 98 stock pitch teams. The summit was supported by 87 professionals from 46 leading financial firms who served as judges, panelists, and volunteers, sharing their insights and helping to inspire the next generation of investors.

YIS Case Study Competition



The case study competition encouraged students to work in small groups to determine strategic recommendations for entertainment company, Live Nation. Students worked together to present their solution to a panel of finance professionals who judged the presentations.

Case Study Competition Winners

Makayo C: Delbarton School, NJ

Aadi V: Frisco High School, TX

George W: St. George's School, Canada

2025 Global Stock Pitch Competition



The 2025 Global Stock Pitch Competition had 644 students participate in the event this year. The top 100 teams were invited to participate in the GYIS event where the teams battled to be crowned the 2025 Global Stock Pitch Champion.



2025 Global Stock Pitch Winners

1st Place: Elijah L: Fairmont Preparatory Academy, CA

2nd Place: Gabriel M & Tanish M: Rouse High School, TX

3rd Place: Shriraghav A: Basis Peoria, AZ

Honorable Mention: Dhruv K & Anhad M: Eastlake High School, WA

Honorable Mention: Vedanth R: Interlake High School, WA

YIS Access Initiative



This year, we achieved an incredible 18% growth in schools, now reaching 327 schools and impacting over 2,500 students across 41 states!

Through after-school program partners, school clubs, and individual participants, the Access Initiative now supports 18% of all YIS students, and we're just getting started.

At this year's Global Youth Investment Summit (GYIS), we were proud to welcome 55 Access students representing 6 states and the Dominican Republic, a true testament to the expanding reach and impact of the program!



YIS 10-Year Anniversary Fundraising Gala



The YIS 10-Year Anniversary Fundraising Gala brought together a distinguished crowd in the heart of Manhattan. The event welcomed 200 guests, including eight sponsored tables generously supported by leading financial institutions such as Bloomberg, Grandeur Peak, Oaktree Capital, First Eagle, PIMCO, Invesco, Goldman Sachs, and individual benefactors. The Gala featured an All-Star Investor Panel moderated by Anna Snider and featured, Cathie Wood, Stephanie Link, and Matthew McLennan.



Anna Snider
Head of Investment Selection
Bank of America



Cathie Wood
Chief Investment Officer
Ark Investment Management



Stephanie Link
Portfolio Manager
Hightower Advisors



Matthew McLennan
Portfolio Manager
First Eagle Investments



Cathie Wood featured with YIS
Citizenship Awardee, Isaac C.

2024-2025 Corporate Sponsors & Partners

We are honored to recognize the following sponsors and partners for their generous support of Young Investors Society.

We are sincerely grateful to collaborate with organizations that share our mission of providing world-class financial literacy and investment education to the next generation of investors. Together, we are working to equip students with the tools, confidence, and mindset to make informed financial decisions, pursue economic opportunity, and build a more secure and prosperous future.

Bloomberg



GRANDEUR PEAK ADVISORS

P I M C O

First Eagle
Investments



OAKTREE

Folsom Family
Foundation



Invesco



J.P.Morgan
ASSET MANAGEMENT

ETHOS
Investment Management

**Goldman
Sachs**

osaic
Foundation

**Dodge
& Cox®**


Advisory Group
for life



Boston Common
Asset Management

 **FIRE CAPITAL**
MANAGEMENT

 **INVESTMENTS**


SUCCESS AND MONEY
FOUNDATION.ORG

Fredrick H Barth Foundation

2024-2025 YIS Outstanding Teacher Awards

The YIS Outstanding Teacher Award recognizes teachers who oversee the YIS program implementation and are able to inspire, promote, and enrich the lives of students via the Young Investors Society program.



Sharon Ferreri: Sayreville War Memorial High School, New Jersey

Shree Awsare: NSU University School, Florida

LaShea Reaves: 8 Cents in a Jar, Florida

Scott Hayes: Rouse High School, Texas

Chad Sawyer: Epic Campus, Colorado

Dr. Rodrigo Castilleja: Vista Ridge High School, Texas

Kathy Marshall: Tolland High School, Connecticut

Omar Naranjo: Timpview High School, Utah

Rivana Stadtlander: American Heritage School, Florida

Wei Wang: Gateway Academy, California

Chris McCart: Reno High School, Nevada

Matt Zipin: Germantown Friends School, Pennsylvania

Lujane Alaboud: Orlando Science High School, Florida

Collin Shipp: Independence High School, Virginia

John Pierce: Diamond Bar High School, California

Thank You For Your Support

Student Testimonials

"Young Investors Society allowed me to advance my own personal knowledge in finance, helping me understand how to manage my money through learning independently and with my friends. I was also able to get so many opportunities, including professional certifications and leadership on a national scale!"

Eshan K.
Cox Mill High School, NC



"My experience with the YIS program has broadened my understanding of finance and encouraged me to learn more about economics. After taking the financial literacy lessons, I was able to develop new skills for the future and apply them when making financial decisions."

Alexander P.
Edison Academy, NJ



"I would recommend YIS to anyone who has interest in a financial career or just to someone looking to improve their financial literacy skills, as this organization is one that has truly has the resources and amenities to help students succeed."

Meiling R.
American Heritage High School, FL



"YIS has allowed me to show my passion for finance and investing through the YIS Global Summit. I enjoyed creating my analysis of a company, working through models, finding ratios, and finally rounding my project out with the finishing touches."

Brody B.
James Madison High School, VA



"What I most enjoy about YIS is being able to immerse myself in the financial sphere. The Global Stock Pitch Competition was my favorite event because I had the opportunity to meet many new peers who had a similar interests while learning about finance from industry professionals."

Beatrix G.
DeBakey High School, TX



"After joining YIS, I was able to take my passion and growing knowledge to create a financial literacy course for students in my area. The Stock Pitch Competition helped me expand my research and analytical skills. I hope to encourage all high school students to join!"

Anjali P.
Garnet Valley High School, PA



Young Investors Society

31248 Oak Crest Drive Suite 200

Westlake Village, CA. 91361

(805) 479-5292

www.YIS.org



**YOUNG
INVESTORS
SOCIETY**